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People & Places

October  
2025

# Biking's contribution to the Queenstown Lakes economy 2025



Source: Destination Queenstown

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October 2025

Version history:

Report issued 30 October 2025

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## 2. Executive summary

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This report estimates biking's contribution to the Queenstown Lakes economy in 2025<sup>1</sup>. The objective is to consider not just the current state of biking in Queenstown Lakes, but also to explore how biking has grown over recent years and how might Queenstown Lakes' bike economy develop in future.

At its heart, this report helps answer the following questions:

- How many people bike in Queenstown Lakes currently?
- How have the number of bikers grown over recent years?
- How much money is spent in Queenstown Lakes by people attracted to the area for biking?
- How might Queenstown Lakes' bike economy develop over the next 10, 20, 30 years?

### 2.1. Biking context in Queenstown-Lakes

Queenstown Lakes is globally renowned as a biking destination. A key strength is that there is a large variety of high-quality trails to choose from, many of which are readily accessible to visitor accommodation and residential neighbourhoods and can quickly lead into backcountry areas.

Trails span all grades of technical difficulty, from scenic recreational trails suitable for all types of bikers to gnarly downhill and jump parks for the more technically minded. The trail networks and mountain bike areas are run by a variety of trusts, community groups, public organisations, and commercial operators.

Queenstown Lakes' trails showcase the areas stunning scenery and many offer access to a variety of other activities along their corridors, including wining and dining opportunities. The trail network keeps expanding, with two new high-profile trails opened in just the past 12 months, and others in construction and planned that will further extend and connect the trail network.

### 2.2. Key findings

- An estimated 344,500 people biked in Queenstown Lakes in the June 2025 year, up almost 90% over the past four years.
- Of these bikers, 338,000 were visitors, while 6,500 were locals who bike regularly for recreation.
- An estimated 15.8% of visitors to Queenstown Lakes bike during their visit and biking formed the main reason for a trip to Queenstown for 41.7% of these bike visitors.
- Collectively these visits motivated by biking are estimated to have generated \$280 million of visitor spending in the June 2025 year. Spending by visitors for whom biking was the key motivation to visit has climbed by 125% in four years in real (inflation-adjusted) terms.
- It is also estimated that as many as 1,148 filled jobs in 2025 were supported by spending by visitors for whom biking was the key motivation to visit.
- Given such rapid growth in Queenstown's bike economy over the past four years, it makes sense to ascertain what potential future demand there might be:
  - If long-term average growth trends that have persisted for the past two decades continue then then there will be 100,000 additional bikers in Queenstown Lakes each year by 2035 compared with their 2025 level, while within 30 years there could be 400,000 more bikers each year than today.
  - Under this scenario the spending effects driven by bike tourism could rise from their current estimate of \$280 million a year to almost \$600 million within 30 years if these long-term trends continue.

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<sup>1</sup> This research builds on a previous piece of analysis by the author of the role of biking in Queenstown Lakes in 2021. See: Benje Patterson (2022), "The contribution of biking to the Queenstown-Lakes economy".

## 3. Current participation in biking in Queenstown Lakes

This section gives estimates of participation in biking in Queenstown Lakes by visitors and locals in 2025.

### 3.1. Biking by visitors

Biking is a key activity that attracts visitors to Queenstown Lakes. It is estimated that 15.8% of visitors to Queenstown Lakes bike during their visit. Participation sits highest for international visitors (17.4% of international visitors bike), while 14.4% of domestic travellers biked<sup>2</sup>. Biking formed the main reason for a trip to Queenstown for 41.7% of these bike visitors<sup>3</sup>.

Participation in biking by visitors to Queenstown Lakes is very high compared to the rest of New Zealand. The Ministry of Business, Innovation, and Employment's (MBIE) International Visitor Survey (IVS) showed that just 6.7% of international travellers to New Zealand biked in the 12 months to June 2025, compared to the 17.4% rate of participation in biking by international visitors to Queenstown Lakes.

Queenstown Lakes attracted 2.1 million visitors in the June 2025 year, with international visitors accounting for 1.0 million visitors, and domestic visitors contributing 1.1 million visitors<sup>4</sup>.

An estimated 338,000 visitors biked in Queenstown Lakes in the June 2025 year, with 174,000 being international visitors and 164,000 being domestic visitors. Biking was the main reason for a trip to Queenstown Lakes for an estimated 141,000 of these bike visitors.

Figure 1



<sup>2</sup> Bike participation by domestic and international visitors to Queenstown Lakes has been estimated from the Queenstown Lakes Visitor Experience Survey (from Destination Queenstown). Over the 24 months to June 2025, almost 2,500 visitors to Queenstown Lakes were surveyed about their activity patterns. The survey highlighted that 17.4% of international visitors biked, while 14.4% of domestic travellers biked. An average among all travellers has been found by weighting these ratios by the respective shares of international and domestic visitors among total visitation to Queenstown Lakes.

<sup>3</sup> Source: Queenstown Trails survey of trail users, 12 months to June 2025.

<sup>4</sup> Visitor numbers have been estimated using a combination of mobile phone monitoring and surveys of average stay lengths of visitors. Mobile phone monitoring (using data from tourism data company Visitr) captures annual visitor days in Queenstown Lakes for domestic and international visitors. This data has been converted into unique visitors using average lengths of stay in Queenstown Lakes for international visitors (using MBIE's IVS) and domestic visitors (using Destination Queenstown's Visitor Experience Monitor).

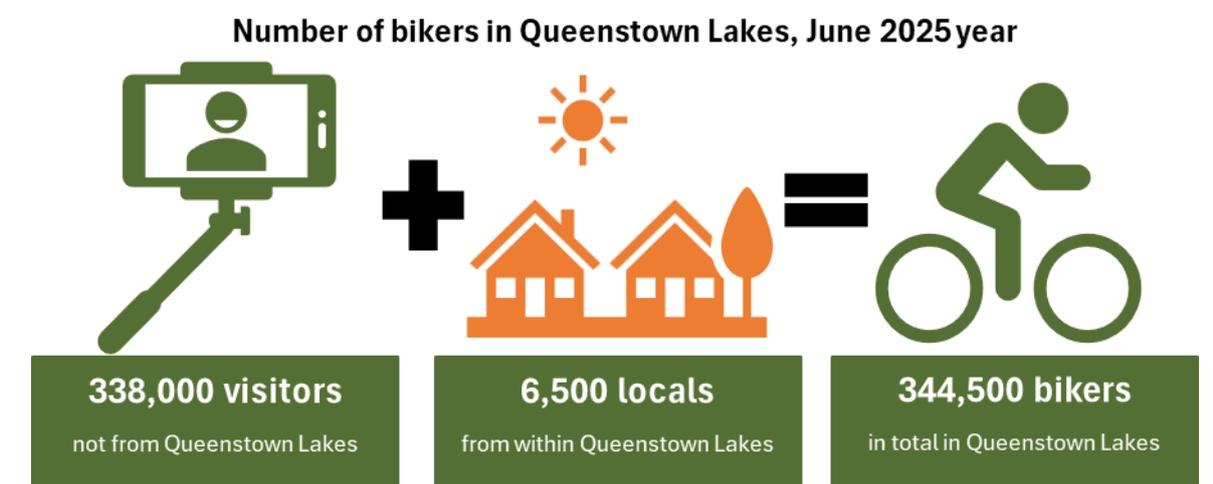
### 3.2. Biking by local residents

Biking is also a key part of local residents’ lives. Sport New Zealand’s data shows that 12% of people bike for recreation<sup>5</sup>. Given the district’s total population of 53,800 (as at June 2025), this implies that 6,500 local residents bike recreationally in Queenstown Lakes.

The Sport New Zealand estimate could, if anything, be conservative as it is an Otago-wide estimate rather than specifically for Queenstown Lakes. Data from Sport New Zealand also only captures residents biking for sport or recreation, while active travel is generally excluded unless it also has a recreational intent. Queenstown Lakes District Council’s Quality of Life Survey (2024) showed 28% of locals bike at least weekly as a mode of transport<sup>6</sup>. This higher figure isn’t used as this report’s core measure because not all travel is material (eg. it includes biking 50 metres to shops).

### 3.3. Summary of current bike participation

The following diagram summarises the estimates of the number of visitors and local residents who bike.



In total it is estimated that there are 344,500 bikers each year in Queenstown Lakes, comprising 338,000 visitors who bike, and a further 6,500 locals who are regular bikers.

Table 1

| Estimates of the total number of people who bike within Queenstown Lakes        |                        |                  |
|---|------------------------|------------------|
| <i>Author estimates of bikers in Queenstown Lakes during the June 2025 year</i> |                        |                  |
| Biker origin  |                        | Number of bikers |
| Local bikers from Queenstown Lakes District                                     |                        | 6,500            |
| Visiting bikers   | International visitors | 174,000          |
|   | Domestic Visitors      | 164,000          |
| <b>Total number of bikers</b>   |                        | <b>344,500</b>   |

<sup>5</sup> Active NZ Survey Data in the Sport NZ Insights Tool.

<sup>6</sup> Up from 27% in the 2021 Quality of Life Survey.

As a point of comparison, calculations from the Queenstown Trails Trust's (QTT) 2025 Annual Report suggest there were around 214,000 bikers using the Trust's trails<sup>7</sup>. The Queenstown Trail Network is a key part of the Wakatipu Basin's biking landscape, but there are other public cycle trails elsewhere in the district not captured by QTT data, as well as several community and commercial mountain bike areas.

### 3.4. How has the number of bikers grown?

The number of bikers each year in Queenstown Lakes has grown by around 90% over the past four years.

Table 2

| <b>Growth in the number of people who bike within Queenstown Lakes</b>                           |                |                |                          |
|--|----------------|----------------|--------------------------|
| <i>Author estimates of bikers in Queenstown Lakes during the June 2025 year compared to 2021</i> |                |                |                          |
| <b>Biker origin</b>  | <b>2021</b>    | <b>2025</b>    | <b>Growth (% change)</b> |
| Local bikers   | 5,313          | 6,500          | 22.3%                    |
| Visiting bikers  | 176,634        | 338,000        | 91.4%                    |
| <b>Total bikers</b>  | <b>181,947</b> | <b>344,500</b> | <b>89.3%</b>             |

It was estimated that the number of visitors to Queenstown Lakes who biked in 2021 was about 176,600, which has now grown to 338,000 visiting bikers in 2025. This growth has massively exceeded a forecast that there would be 235,000 visiting bikers by 2026<sup>8</sup>.

Growth in biking among the visitor market can be attributed to:

- Rising participation rates in biking among travellers. Surveys showed that 12% of visitors biked in 2021, compared to the 15.8% participation rate among visitors now.
- Sharp growth in underlying visitor numbers. In 2021, when the borders were closed due to Covid-19, it was estimated that Queenstown Lakes attracted 1.5 million visitors, which has since risen above 2.1 million as the tourism industry recovered.

Growth in the number of local bikers has primarily been driven by population growth. In 2021, there were an estimated 47,300 residents in Queenstown Lakes, which has since risen to 53,800. A 12% participation rate in biking among locals has also been used, compared to an 11% participation rate in previous research.

The rapid growth in biking across Queenstown Lakes estimated as part of this report has also been supported by other datasets. For example:

- Trailforks recorded a 152% increase in rider check-ins across Queenstown Lakes between the 2021 and 2024 calendar years. The Trailforks system is primarily used by mountain bikers rather than recreational bikers along the Queenstown Trail network.
- It is estimated that the Queenstown Trails Trust has seen 52% growth in underlying usage of its trails by bikers between 2021 and 2025 (from 143,787 bikers in 2021 to 214,000 in 2025).

<sup>7</sup> The QTT estimated that 51% of its 419,150 trail users were bikers, with 49% being pedestrians.

<sup>8</sup> As projected in 'Benje Patterson (2022), The contribution of biking to the Queenstown-Lakes economy'.

## 4. Economic impacts of biking

This section gives estimates of the economic impacts of the bike economy to Queenstown Lakes. These effects are based on total spending by visitors to Queenstown Lakes for whom biking was the main reason for their visit. The reason for focussing the analysis on spending by these bike visitors is that their spend represents fresh money in the local economy which would not have existed in the absence of the bikers' visit. Spending by visitors who happen to bike, but for whom biking is not a key motivation for the visit, is excluded as it is assumed those visitors would have come to Queenstown Lakes anyway. Locals' expenditure on biking is also not factored into core measures of the economic impact as it is likely that Queenstown-Lakes residents would simply spend their household budget on other things in the district had they not spent the money on their bikes.

### 4.1. Characteristics of a visitors' stay

The average Queenstown Lakes visitor stays 5.2 nights<sup>9</sup> and spends \$379 a day<sup>10</sup>.

**Table 3**

| Average stay length and daily spend by visitors to Queenstown Lakes by visitor type                    |                       |                        |                         |
|--|-----------------------|------------------------|-------------------------|
| <i>Author estimates, based on Destination Queenstown, MBIE, and Statistics NZ data, June 2025 year</i> |                       |                        |                         |
| Visitor origin   | Average stay (nights) | Average spend (\$/day) | Share of total visitors |
| Domestic visitor   | 5.5                   | \$338                  | 53.3%                   |
| International visitor  | 4.9                   | \$426                  | 46.7%                   |
| <b>Average all visitors</b>  | <b>5.2</b>            | <b>\$379</b>           | <b>100.0%</b>           |

### 4.2. Economic impacts of bike visitors

It is estimated that total spending in Queenstown Lakes by visitors for whom biking was key motivation to visit was \$280 million in the June 2025 year<sup>11</sup>.

<sup>9</sup> Average stay length for domestic visitors is from the Queenstown Lakes Visitor Experience Survey, while for international visitors it has been calculated from MBIE's IVS. An average across both has been found by weighting spending for each visitor type by that visitor type's share of total visitors. All data is to June 2025.

<sup>10</sup> Spending for international visitors has been calculated as average daily spending by visitors to New Zealand who include Queenstown Lakes as part of their visitor itinerary. There is limited recent information available on domestic travellers' daily budgets in the Queenstown context. However, the discontinued New Zealand Regional Tourism Estimates from Statistics New Zealand highlighted that New Zealand travellers to Queenstown in 2011 spent 20.7% less each day than the average international traveller. A weighted average daily spend across both visitor types was then calculated using visitor shares. All data is to June 2025.

<sup>11</sup> This estimate has been formed by taking the estimated 141,000 visitors for whom biking was the key reason for visiting Queenstown Lakes and multiplying them by the average stay length and daily spend estimates in Section 4.1. The 141,000 visitors for whom biking was the key reason for visiting represents 41.7% of all visitors who bike and is drawn from a QTT survey of trail users for the 12 months to June 2025. This assumption is conservative compared to a Queenstown Mountain Bike Club 2016/17 survey of trail users and members, which suggested that biking was the main purpose of a visit to Queenstown for 65% of bike visitors.

This spending represents the direct economic impacts on the Queenstown Lakes economy attributable to the role of biking within the visitor economy – in the absence of the availability of biking, these people may not have been in the area spending money.

**Table 4**

| <b>Total spending in Queenstown Lakes from visitors whose main travel motivation is to bike</b>                 |                              |
|---|------------------------------|
| <i>Calculated with estimates of visits motivated by biking &amp; stay length/spend assumptions, Jun-25 year</i> |                              |
| <b>Visitor origin</b>   | <b>Total spend (\$m, pa)</b> |
| Domestic visitor  | \$127m                       |
| International visitor   | \$153m                       |
| <b>Total all visitors (biking = main travel motivation)</b>   | <b>\$280m</b>                |

The \$280 million of visitor spending that can be attributed to travel motivated by biking is equivalent to close to 10% of the \$2.8 billion of total visitor spending in Queenstown Lakes over the June 2025 year<sup>12</sup>.

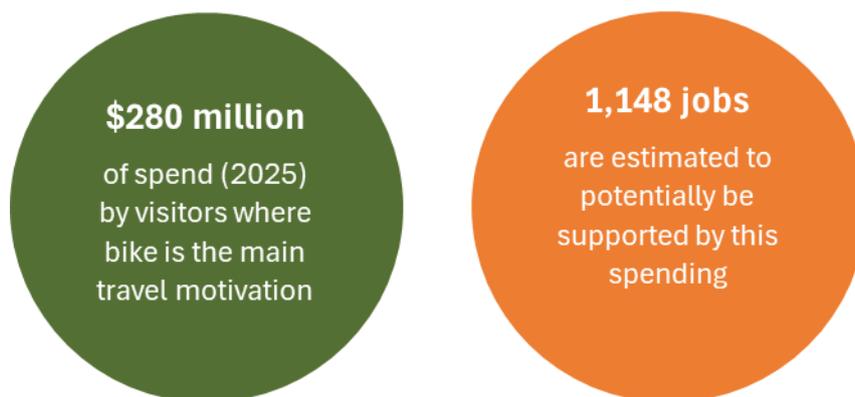
Spending by visitors for whom biking was the key motivation to visit has climbed by 125% in four years in real (inflation-adjusted) terms<sup>13</sup>.

The key reason for this growth has been a sharp lift in the number of higher spending international bike visitors following the reopening of borders in 2022 after the Covid-19 pandemic. The additional spending that occurs because of people choosing to visit for biking can also support a significant amount of employment in Queenstown Lakes.

It is estimated that as many as 1,148 filled jobs in 2025 were supported by spending by visitors for whom biking was the key motivation to visit<sup>14</sup>.

In comparison, employment in the Queenstown Lakes visitor economy in 2021, supported by spending by visitors primarily coming to bike, was estimated to be 520 jobs. This suggests a 121% lift in employment supported by spending brought into the area by bike tourists over the past four years.

**Figure 2**



<sup>12</sup> Source: Infometrics Queenstown Lakes Quarterly Economic Monitor (June 2025). This estimate is indicative only – it makes adjustments to MBIE estimates of card spending to also include cash and online purchases.

<sup>13</sup> Spending associated with travel to Queenstown Lakes primarily motivated by biking in 2021 was estimated at \$101.6 million, which is equivalent to \$124.2 in current price terms after adjusting for inflation.

<sup>14</sup> A filled jobs estimate was formed by using a multiplier of tourism spending to jobs (calculated with data extracted on 24/10/22 from Infometrics Queenstown-Lakes [Economic Profile](#)).

## 5. Future demand for biking in Queenstown Lakes

The previous sections of this report identified the current participation in biking in Queenstown Lakes and the contribution of bike tourism to spending within the visitor economy.

Given such rapid growth in Queenstown's bike economy over the past four years, and the additional trails recently opened, as well as those currently under construction or in the planning phase, it makes sense to ascertain what potential future demand there might be.

### 5.1. Introducing potential growth scenarios

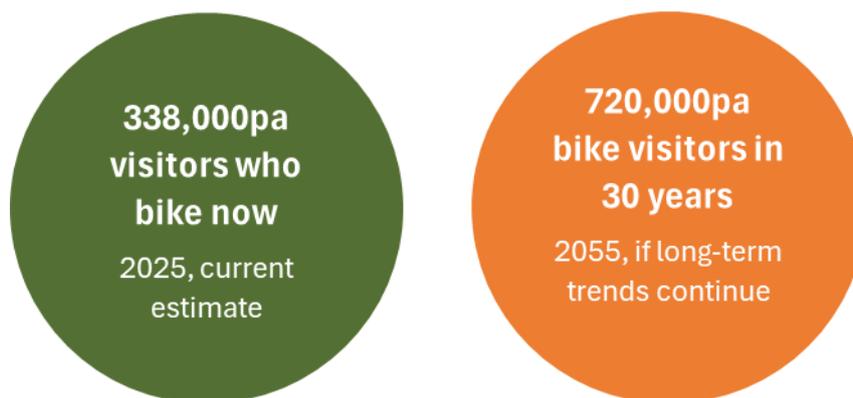
Two potential scenarios for growth have been used to form forward projections of potential biking demand in Queenstown Lakes:

- **QLDC projections (conservative).** QLDC prepares demand projections for use in infrastructure planning which are relatively conservative compared to long-term averages. These projections are prepared for both the resident population and for visitor demand. Average annual growth rates in these projection ranges is assumed to average 2.5%pa from 2025-2035, then 1.9%pa from 2035-2045, and 1.6%pa from 2045-2055<sup>15</sup>.
- **Long-term growth continues.** A second projection scenario has been used that assumes a continuation of historical long-term growth patterns that have persisted for the past 20 years. Long-term growth averages are much higher than the QLDC scenario and range from 2.6%pa for visitor numbers<sup>16</sup> to 4.4%pa for the resident population<sup>17</sup>.

Because Queenstown Lakes has demonstrated such a sustained long-term pattern of high growth that exceeds projections from QLDC (and government departments like Statistics New Zealand) it is important to also factor in a demand scenario based on this pattern continuing.

### 5.2. The number of bikers under future growth scenarios

Figure 3



<sup>15</sup> Source: QLDC demand projections, May 2025.

<sup>16</sup> Calculated as annual average growth (%pa) from visitor guest nights in Statistics New Zealand's Commercial Accommodation monitor for the June 2005 year, compared to total visitor guest nights in MBIE's Accommodation Data Programme for the June 2025 year for Queenstown Lakes.

<sup>17</sup> Calculated as the annual average growth (%pa) in Queenstown Lakes population in Statistics New Zealand's Subnational population estimates for June 2025 compared to June 2005.

Table 5

| <b>How many potential bikers are there under the future growth scenarios?</b>                   |                             |                 |                     |                                   |                 |                     |
|---|-----------------------------|-----------------|---------------------|-----------------------------------|-----------------|---------------------|
| <i>Number of bikers projected under each growth scenario relative to 2025 baseline estimate</i> |                             |                 |                     |                                   |                 |                     |
|   | <b>QLDC growth scenario</b> |                 |                     | <b>Long-term growth continues</b> |                 |                     |
|   | <b>Local</b>                | <b>Visiting</b> | <b>Total bikers</b> | <b>Local</b>                      | <b>Visiting</b> | <b>Total bikers</b> |
| 2025  | 6,500                       | 338,000         | <b>344,500</b>      | 6,500                             | 338,000         | <b>344,500</b>      |
| 2035  | 8,300                       | 431,000         | <b>439,300</b>      | 10,000                            | 435,000         | <b>445,000</b>      |
| 2045  | 10,000                      | 521,000         | <b>531,000</b>      | 15,300                            | 560,000         | <b>575,300</b>      |
| 2055  | 11,700                      | 611,000         | <b>622,700</b>      | 23,500                            | 720,000         | <b>743,500</b>      |

If long-term growth trends continue then there will be 100,000 additional bikers in Queenstown Lakes each year by 2035 compared with their 2025 level, while within 30 years there could be 400,000 more bikers each year than today. If a more conservative scenario by QLDC unfolds then biker numbers would rise by about 280,000 a year within 30 years.

Both scenarios have assumed that the participation rate in biking remains constant for visitors (15.8% of visitors bike) and for locals (12% of locals biking for recreation). If either of these participation rates increase, then so too would the projected number of bikers. Given signs of an increase in participation rates, especially among travellers over recent years, this assumption may ultimately prove conservative.

### 5.3. Economic impacts under the future growth scenarios

If behaviours by visitors to Queenstown Lakes for whom biking is the key motivation to visit follow a similar pattern to today<sup>18</sup>, then the spending effects driven by bike tourism could rise from their current estimate of \$280 million a year to almost \$600 million within 30 years if long-term trends continue. If QLDC's more conservative scenario unfolded, then spending would instead rise to just over \$500 million a year within 30 years.

Table 6

| <b>How much visitor spending and jobs could occur because of future growth in bike tourism?</b> |                             |             |                                   |             |
|---|-----------------------------|-------------|-----------------------------------|-------------|
| <i>Projected spend/jobs from visitors where biking is the main travel motivation</i>            |                             |             |                                   |             |
|   | <b>QLDC growth scenario</b> |             | <b>Long-term growth continues</b> |             |
|   | <b>Spend (\$m, pa)</b>      | <b>Jobs</b> | <b>Spend (\$m, pa)</b>            | <b>Jobs</b> |
| 2025  | \$280m                      | 1,148       | \$280m                            | 1,148       |
| 2035  | \$357m                      | 1,464       | \$361m                            | 1,478       |
| 2045  | \$432m                      | 1,770       | \$464m                            | 1,902       |
| 2055  | \$507m                      | 2,075       | \$597m                            | 2,446       |

<sup>18</sup> This includes biking continuing to form a key motivation for visiting Queenstown Lakes in the first place among 41.7% of the visitors who bike, and for there to be changes to stay length or average daily spend (after adjusting for inflation).

## 6. Concluding remarks

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This report has highlighted the increasingly influential role which biking is playing within the Queenstown Lakes economy.

An estimated 344,500 people biked in Queenstown Lakes in the June 2025 year, up almost 90% over the past four years. Of these bikers, 338,000 were visitors to the district, while 6,500 are locals who bike regularly for recreation.

Biking is a key activity that attracts visitors to Queenstown Lakes. It is estimated that 15.8% of visitors to Queenstown Lakes bike during their visit and biking formed the main reason for a trip to Queenstown for 41.7% of these bike visitors.

Collectively these visits motivated by biking are estimated to have generated \$280 million of visitor spending in the June 2025 year. This spending represents the direct economic impacts on the Queenstown Lakes economy attributable to the role of biking within the visitor economy – in the absence of the availability of biking, these people may not have been in the area spending money. It is also estimated that as many as 1,148 filled jobs in 2025 were supported by spending by visitors for whom biking was the key motivation to visit.

The \$280 million of visitor spending that can be attributed to travel motivated by biking is equivalent to close to 10% of the \$2.8 billion of total visitor spending in Queenstown Lakes over the June 2025 year. Spending by visitors for whom biking was the key motivation to visit has climbed by 125% in four years in real (inflation-adjusted) terms.

Given such rapid growth in Queenstown's bike economy over the past four years, and the additional trails recently opened, as well as those currently under construction or in the planning phase, it makes sense to ascertain what potential future demand there might be. If long-term average growth trends that have persisted for the past two decades continue then there will be 100,000 additional bikers in Queenstown Lakes each year by 2035 compared with their 2025 level, while within 30 years there could be 400,000 more bikers each year than today.

If behaviours by visitors to Queenstown Lakes for whom biking is the key motivation to visit follow a similar pattern to today, then the spending effects driven by bike tourism could rise from their current estimate of \$280 million a year to almost \$600 million within 30 years if these long-term trends continue.

