

Economic Contribution and Social Benefits of Recreational Hunting in Victoria

FINAL REPORT

8 September 2026

IDEAS | PEOPLE | TRUST

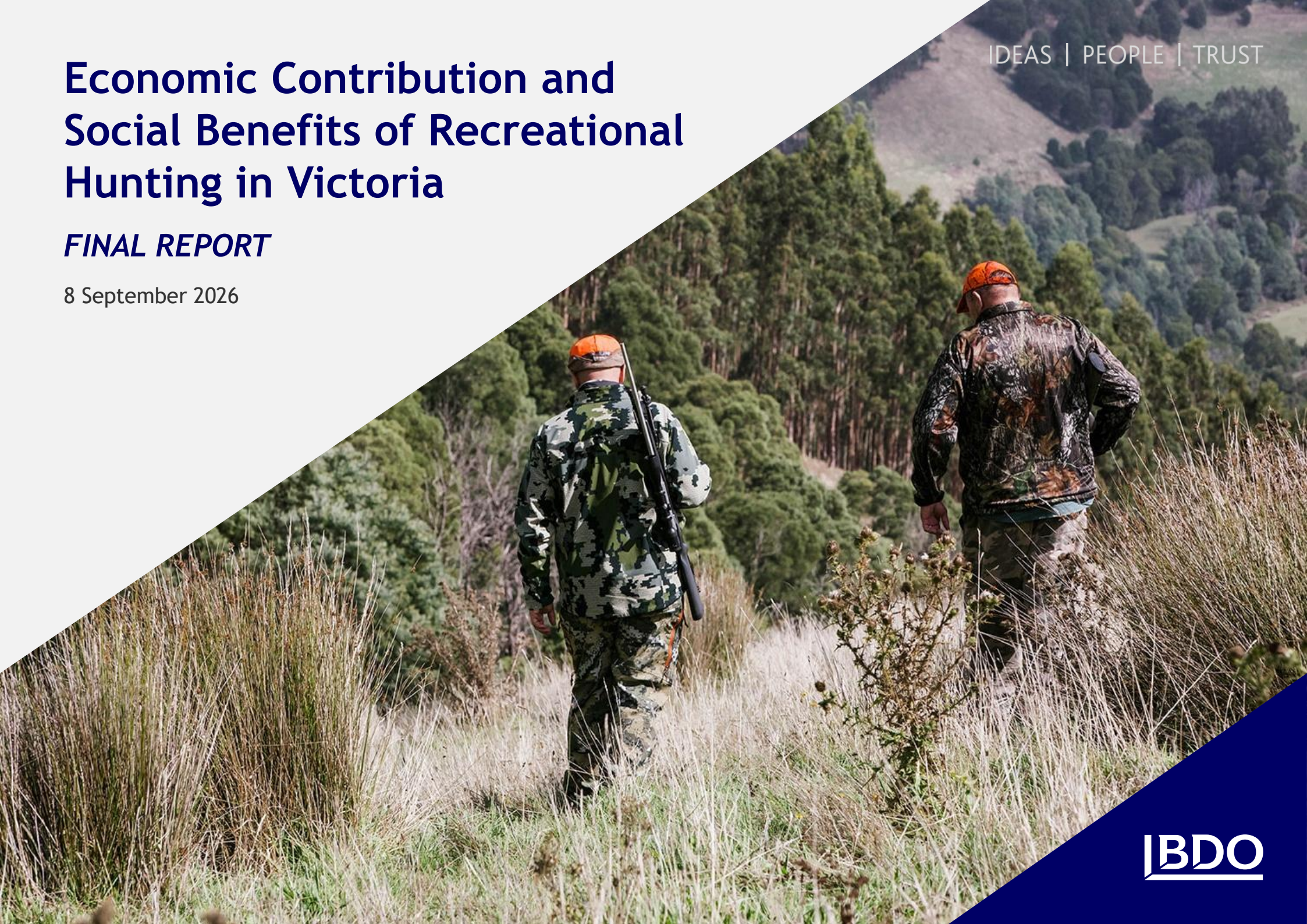


Table of contents

1.	Executive summary	3
2.	Introduction	8
3.	Key market insights	14
4.	Approach to the study	18
5.	Economic contribution	23
6.	Social benefits	29
7.	Volunteerism	34
8.	Appendices	38



1

Executive summary



1	Executive summary
2	Introduction
3	Key market insights
4	Approach to the study
5	Economic contribution
6	Social benefits
7	Volunteerism
8	Appendices

Key findings

Game licensed recreational hunting contributed an estimated \$559 million in Gross State Product (GSP) and supported 3,703 full-time equivalent (FTE) jobs in Victoria in 2025. Victorian game licence holders reported higher personal wellbeing, social capital and general health than the Victorian population.

This study

In October 2025, BDO was engaged by the Department of Jobs, Skills, Industry and Regions (DJSIR) to assess the Economic Contribution and Social Benefits of Recreational Hunting in Victoria. The analysis covers the 12 months to February 2026 (referred to as “2025” for simplicity).

The study focuses on Victorian game licence holders who recreationally hunt game species (including deer, duck and quail) and pest species (including foxes, rabbits, pigs and goats). Further information on the scope of the study, including those surveyed is detailed on page 9.

Analysis is undertaken at multiple geographic levels, including Victoria, Greater Melbourne, the nine Regional Development Victoria (RDV) Regional Partnerships¹, the top 20 regional Local Government Areas (LGAs) and the top 40 regional towns.

Key findings are based on two primary inputs:

- Survey of Victorian game licence holders:** BDO and Action Market Research (AMR) delivered an online survey of game licence holders to quantify hunting-related trip and non-trip expenditure. The survey received 2,583 responses, representing 4.5% of the Victorian game licence holder population. It also captured information on personal wellbeing, social capital, general health, volunteer activity, motivations to hunt and barriers to increased participation in hunting.
- Stakeholder consultations:** BDO undertook 15 consultations, including with 8 hunting associations, 3 retailers and 4 tourism bodies. These consultations informed understanding of drivers and barriers to hunter participation, factors influencing hunter expenditure, the importance of recreational hunting to regional Victoria, volunteerism and community contribution, and the broader research and environmental contribution of recreational hunters.

¹ Regional Development Victoria. *About Regional Partnerships*. Available [here](#).

Species hunted by game licence holders		GSP ²
	Game - Deer	\$377.3m
	Game - Duck	\$76.7m
	Game - Quail	\$9.7m
	Pest - Fox ³	\$50.4m
	Pest - Rabbit ³	\$26.4m
	Pest - Pig ³	\$15.3m
	Pest - Goat ³	\$3.2m
Total		\$559.0m

Social Benefit		Index score
	Personal Wellbeing Index	79.5
	Social Capital Index	80.6
	General Health	71.0

² These estimates exclude expenditure by game licence holders under the age of 18 and game licence holders hunting for professional reasons. Further information on the scope of the study, including those surveyed is detailed on page 9.

³ GSP estimates for pest animals are conservative as they only capture pest animal hunters who also hunt game species. They do not include individuals who exclusively hunt pest animals and do not hold a game licence. As of 2025, there were 240,565 firearms licence holders in Victoria (compared to 56,965 game licence holders), some of whom may participate in pest hunting activities. Source: Department of Justice and Community Safety Victoria. *Rapid Review of Victoria’s Firearms Laws*. Available [here](#).

- 1 Executive summary
- 2 Introduction
- 3 Key market insights
- 4 Approach to the study
- 5 Economic contribution
- 6 Social benefits
- 7 Volunteerism
- 8 Appendices

Economic contribution of recreational hunting to Victoria

Over 70% of economic contribution was generated in regional Victoria, led by Gippsland (15%) and Ovens Murray (11%). This reflects that around 70% of trip expenditure and 60% of non-trip expenditure occurs in regional areas.

Economic contribution by region

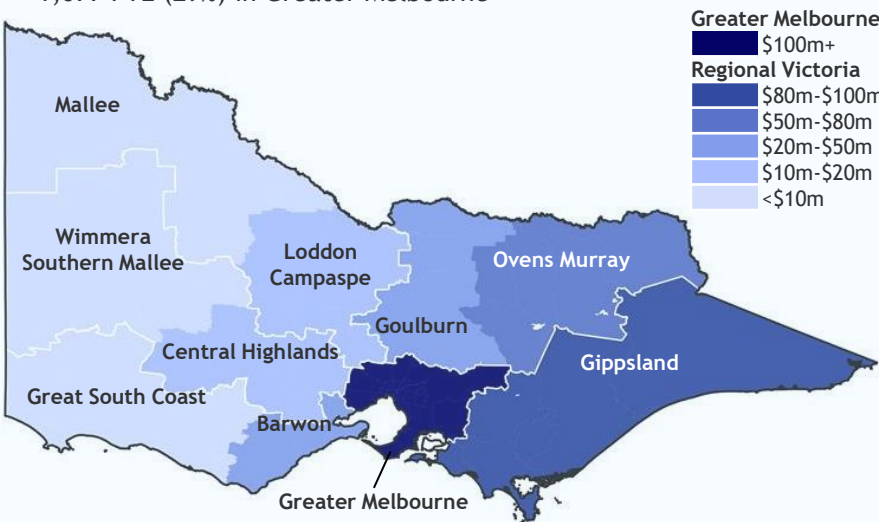
Game licensed recreational hunting contributed an estimated **\$559.0 million in GSP** to Victoria in 2025 (\$202.4 million direct and \$356.5 million indirect). Game species hunting accounted for 83% of this contribution, while pest species hunting contributed the remaining 17%.

\$401.6 million (72%) was generated in regional Victoria (\$131.8 million direct and \$269.7 million indirect), led by:

- Gippsland (\$81.7 million; 15% of regional total)
- Ovens Murray (\$59.9 million; 11% of regional total)

This activity supported an estimated **3,703 FTE jobs** across Victoria, including:

- 2,626 FTE (71%) in regional Victoria
- 1,077 FTE (29%) in Greater Melbourne



Economic contribution - Top regional LGAs

The top five regional LGAs contributing the most to GSP (direct and indirect) were:

1. Wellington (Gippsland) - \$20.1 million
2. Mansfield (Ovens Murray) - \$16.7 million
3. Baw Baw (Gippsland) - \$16.5 million
4. East Gippsland (Gippsland) - \$15.9 million
5. Wodonga (Ovens Murray) - \$12.6 million

Further detail on the top regional LGAs is provided on pages 26 and 42.

Direct expenditure - Top regional towns¹

The regional towns generating the highest levels of expenditure were:

1. Mansfield (Ovens Murray) - \$36.3 million
2. Wodonga (Ovens Murray) - \$23.2 million
3. Bairnsdale (Gippsland) - \$21.8 million
4. Sale (Gippsland) - \$21.2 million
5. Warragul (Gippsland) - \$19.9 million
6. Morwell (Gippsland) - \$15.7 million
7. Bendigo (Loddon Campaspe) - \$15.2 million
8. Wangaratta (Ovens Murray) - \$12.8 million
9. Traralgon (Gippsland) - \$9.4 million
10. Geelong (Barwon) - \$9.1 million

Further detail on the top regional towns is provided on pages 43 and 44.

¹ Economic contribution estimates for LGAs are lower than expenditure estimates for towns because they apply multipliers (less than one) to estimate direct and indirect impacts from expenditure, whereas town results are based on direct expenditure only.

- 1 Executive summary
- 2 Introduction
- 3 Key market insights
- 4 Approach to the study
- 5 Economic contribution
- 6 Social benefits
- 7 Volunteerism
- 8 Appendices

Growth in economic contribution

GSP from recreational hunting increased by \$202.9 million - from \$356.1 million in 2019 to \$559.0 million in 2025, representing a 24% real increase. FTE supported by this activity increased by 565 (18%), from 3,138 to 3,703.

Growth in economic contribution

GSP increased from \$356.1 million in 2019 to \$559.0 million in 2025, while FTE employment increased from 3,138 to 3,703.

Growth in direct expenditure

This growth was driven by higher total direct expenditure, which increased from \$351.0 million in 2019 to \$562.2 million in 2025, representing a 26% real increase.¹

Both trip and non-trip expenditure increased:

- **Trip expenditure** increased from \$211.6 million to \$314.0 million, representing a 17% real increase. The largest increases were in fuel, ammunition and groceries.
- **Non-trip expenditure** increased from \$139.4 million to \$248.2 million, representing a 40% real increase. The largest increases were in firearm equipment, other equipment and vehicles.

Key drivers of growth in direct expenditure

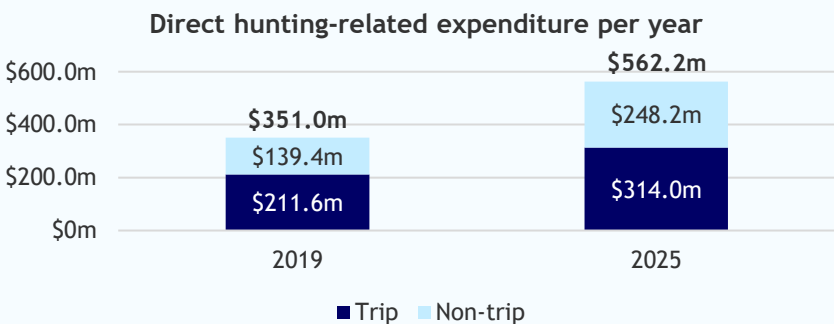
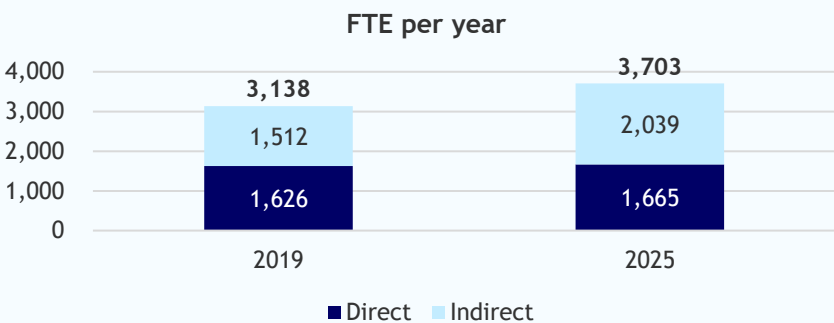
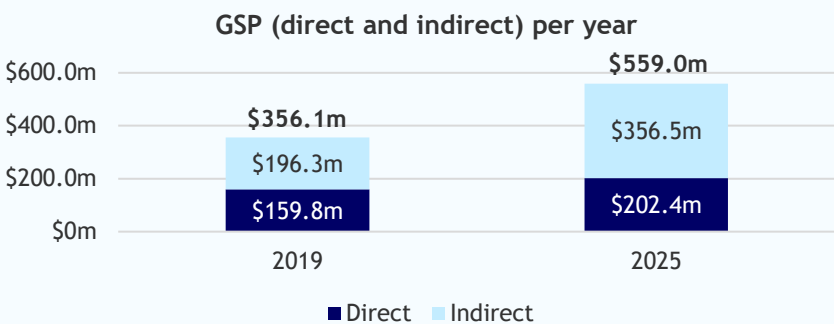
Growth in direct expenditure was driven by:

- **More game licence holders:** The number of Victorian game licence holders increased by 4,414 or 8% (from 52,551 to 56,965).²
- **More active hunters:** The proportion of game licence holders who hunted in the previous 12 months increased from 92.7% to 93.9%.²
- **More hunting trips:** The average number of trips per hunter increased by 10%, from 15.2 to 16.7 per year.²
- **Higher expenditure per hunter:** Average spend per hunter increased across both trip and non-trip categories.³

¹ Real change adjusts the 2019 values to 2025 prices to account for inflation before comparing the two.

² Game Management Authority. *Annual Reports*. Available [here](#).

³ Based on survey data collected by BDO.



1	Executive summary
2	Introduction
3	Key market insights
4	Approach to the study
5	Economic contribution
6	Social benefits
7	Volunteerism
8	Appendices

Key market and social insights

Key insights relate to participation drivers and barriers, expenditure patterns, regional impacts, volunteer and research contributions, and social benefits.

Demographics of Victorian game licence holders

In 2025, there were 56,965 Victorian game licence holders. Licence holders are predominantly male (95%) and have a median age of 46 years. Most reside in Victoria (86%), evenly split between Greater Melbourne and regional Victoria (43% each), while the remaining 14% live interstate, including 8% in New South Wales.

Drivers and barriers to hunter participation

Stakeholders and survey respondents advised that access to land is the primary enabler of participation in recreational hunting and the main constraint when restricted. Hunting is motivated by a range of factors, including food harvesting, time spent outdoors, family tradition and social connection. However, stakeholders and survey respondents also advised that participation can be limited by constrained access to land, wetland conditions (for duck hunting), pest management programs such as baiting (for hound hunting) and increased testing and regulatory requirements.

Factors influencing hunter expenditure

Hunter expenditure varies by species, hunting method and trip patterns. The survey results and consultation insights indicate that duck and hound hunters tend to undertake longer trips with higher spending on accommodation and local services, while deer stalkers and pest hunters tend to undertake shorter, more frequent trips. Expenditure is concentrated in regional Victoria, with nearby towns often capturing spend on fuel, groceries, accommodation and retail. Spending patterns are also influenced by season settings, bag limits and access to hunting locations.

Importance of recreational hunting to Victoria

Recreational hunting generated \$401.6 million in GSP across regional

Victoria (72% of the Victorian total). Despite this contribution, consultations indicate hunting is not actively promoted by tourism bodies.

Volunteerism and community contribution

Recreational hunters make a meaningful contribution to conservation, land management and emergency response activities across Victoria. Survey results indicate that hunters contribute an average of 41.8 volunteer hours per year, including 28.4 hours dedicated to pest control activities. The remaining hours are spent on other volunteering activities such as litter clearing, habitat restoration, track maintenance, and fire and wildlife rescue. These contributions may reduce the need for direct funding by public agencies and likely support broader environmental and community outcomes.

Broader research and environmental contribution

Recreational hunters also contribute to wildlife research and management through activities such as population monitoring, data collection and habitat observation. Para Park Co-Operative Game Reserve on Sunday Island is a key example.

Social benefits of recreational hunting

Recreational hunters reported higher levels of personal wellbeing, social capital and general health compared to the Victorian population.

- **Personal Wellbeing Index:** 79.5 vs 71.5, with higher scores across all seven metrics.
- **Social Capital Index:** 80.6 vs 78.7, with higher scores across eight of nine metrics.
- **General Health:** 71.0 vs 59.5, with over two-thirds reporting excellent or very good health.

2

Introduction



1	Executive summary
2	Introduction
3	Key market insights
4	Approach to the study
5	Economic contribution
6	Social benefits
7	Volunteerism
8	Appendices

Purpose, background and scope of the study

This study examines the Economic Contribution and Social Benefits of Recreational Hunting in Victoria in 2025. It focuses on game licence holders who recreationally hunt game species (including deer, duck and quail) and pest species (including foxes, rabbits, pigs and goats).

Purpose of this report

The Department of Jobs, Skills, Industry and Regions (DJSIR) commissioned this study to examine the economic contribution and social benefits of game licensed recreational hunting in Victoria. BDO undertook the study in partnership with AMR.

This report is the third study commissioned by the Victorian Government to assess the economic contribution and social benefits of game licensed recreational hunting in Victoria. It follows two previous reports in 2013 and 2019, enabling a historical comparison of contribution trends over the past 12 years.

Background to the study

Recreational hunting involves the lawful pursuit and taking of declared game species, such as deer, duck, quail and introduced game birds, under a game licence. It also includes the recreational hunting of declared pest animals, such as foxes, rabbits, pigs and goats, which requires a firearms licence but not a game licence.

Recreational hunting is a significant economic contributor to Victoria, particularly in regional areas. It supports a broad value chain, including retailers, accommodation providers, fuel and grocery outlets, guiding services and tourism operators.

Recreational hunting also provides a range of social benefits. People undertake hunting for a range of reasons, including food provision, enjoyment and time spent outdoors, contribution to pest species management, the continuation of family or cultural traditions, social connection with family and friends, connection to place, and benefits to health and wellbeing.

Scope of the study

This study examines the Economic Contribution and Social Benefits of Recreational Hunting in Victoria. It focuses on Victorian game licence holders who recreationally hunt game species (including deer, duck and quail) and pest species (including foxes, rabbits, pigs and goats). The table below summarises the in-scope and out-of-scope elements of this study.

Item	In-scope	Out-of-scope
Geography	Recreational hunting that takes place within Victoria.	Hunting activity undertaken interstate or overseas, even if undertaken by a Victorian game licence holder.
Licence type	Victorian game licence holders over 18 years of age.	Junior game licence holders. Recreational pest hunters who do not also hunt game and therefore do not hold a game licence.
Age	Individuals aged 18 years and older.	Individuals under the age of 18.
Types of hunting	Recreational hunting of declared game species (such as deer, duck, quail) and declared pest animals (such as foxes, rabbits, pigs and goats).	Professional hunting activities (e.g. fee-for-service pest control) and in accordance with the <i>Traditional Owners Settlement Act 2010</i> or the <i>Native Title Act 1993 (Cwth)</i> .
Types of expenditure	All recreational hunting-related expenditure, including trip and non-trip expenditure.	Outdoor recreational expenditure not attributable to recreational hunting.
Timeframe	Recreational hunting undertaken in the 12 months prior to the survey rollout (February 2026).	Recreational hunting undertaken outside this period.

1	Executive summary
2	Introduction
3	Key market insights
4	Approach to the study
5	Economic contribution
6	Social benefits
7	Volunteerism
8	Appendices

Approach to the study

The study applied a structured, five-step approach covering project scoping, market research (survey and stakeholder consultations), survey weighting, economic modelling and social analysis.

The study was undertaken using a structured, five-step approach:

1. **Project scoping:** BDO worked with DJSIR to confirm the in-scope and out-of-scope elements of the study, including geography, licence type, age, types of hunting, types of expenditure and timeframe.
2. **Market research:** BDO and AMR collected primary data to support the economic analysis.
 - i. **Survey of Victorian game licence holders:** BDO, in partnership with AMR, designed and delivered an online survey to quantify hunting-related trip and non-trip expenditure. The survey received 2,583 responses, representing 4.5% of Victorian game licence holders. It also captured information on personal wellbeing, social capital, general health, volunteer activity, motivations to hunt and barriers to increased participation. The full survey is provided in Appendix G.
 - ii. **Stakeholder consultations:** BDO undertook consultations with 15 stakeholders, including eight hunting associations, three retailers and four tourism bodies. These consultations informed understanding of drivers and barriers impacting hunter participation, factors that influence hunter expenditure, the importance of recreational hunting to regional Victoria, volunteerism and community contribution, and the broader research contribution of the hunting community. The full list of stakeholders is provided on page 21.
3. **Survey weighting:** A review of the survey data found that expenditure varied by species licensed to hunt, age and gender. To account for this, responses were weighted to align the survey with the population across these characteristics. This approach provides a more robust estimate of total expenditure than applying a uniform sample-to-population weighting across all responses.

4. **Economic contribution assessment:** Weighted expenditure estimates were aggregated to estimate the contribution of recreational hunting to:

- i. **Gross State Product (GSP),** representing value added to the Victorian economy from hunting-related expenditure (i.e. net of input costs).
- ii. **Full-time equivalent (FTE) employment,** representing jobs supported across the Victorian economy from hunting-related expenditure.

BDO estimated GSP and employment impacts using its in-house Regional Industry Structure & Employment (RISE) input-output model. The model captures both direct and indirect (flow-on) effects across the Victorian economy.

5. **Social benefits assessment:** The social benefits of recreational hunting were assessed using three survey-based indicators:

- i. **Personal Wellbeing Index (PWI):** The PWI measures wellbeing across seven life domains, including standard of living, health, achieving in life, personal relationships, safety, feeling part of the community and future security.
- ii. **Social Capital Index (SCI):** The SCI measures social connectedness and access to support through local networks. It uses indicators such as time spent with friends and family and sense of belonging in the local community. Higher scores indicate stronger social ties and greater access to support.
- iii. **General health:** General health was measured using a standard self-rated health question, asking respondents to rate their overall health as excellent, very good, good, fair or poor.

Victorian game licence holder demographics

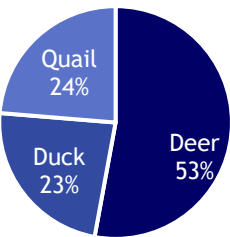
Of the 56,965 Victorian game licence holders, more than 9,000 are licensed to hunt multiple species. The population is predominantly male and concentrated among those aged 30 to 59. Most reside in Victoria (86%), evenly split between Greater Melbourne and regional Victoria (43% each).

Species distribution

As of 30 June 2025, there were 56,965 Victorian game licence holders. By species, this includes:

- 46,743 deer licence holders
- 20,685 duck licence holders
- 20,940 quail licence holders

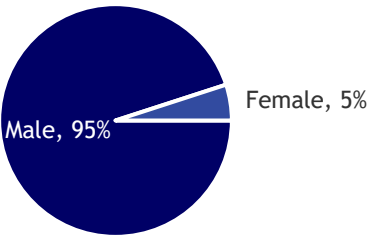
Species distribution of Victorian game licence holders¹



Gender distribution

The overwhelming majority of licence holders are male (95%), with females comprising 5%.

Gender distribution of Victorian game licence holders

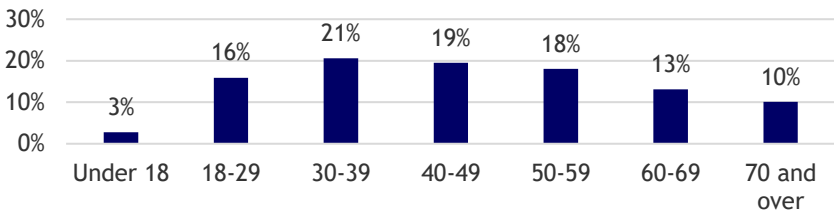


¹ While 24% of game licence holders were authorised to hunt quail in 2025, quail is an additional entitlement under a duck licence. Harvest surveys show that the number of hunters who actively hunt Stubble Quail each year fluctuates between approximately 3,000 and 7,000. In 2025, changes were made to the licensing system to separate Stubble Quail licences from Game Duck licences, meaning more accurate information on the number of Stubble Quail hunters will be available in the future.

Age distribution

The average age of Victorian game licence holders is 46 years, with participation highest among those aged 30 to 59 (58% of the total). Less than 20% are aged under 30, including 3% aged under 18.

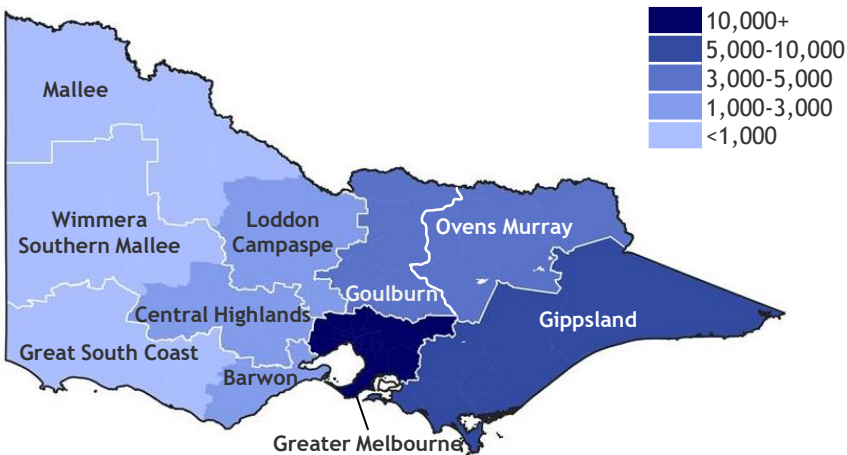
Age distribution of Victorian game licence holders



Geographical distribution

86% of Victorian game licence holders reside in Victoria, evenly split between Greater Melbourne and regional Victoria (43% each). The remaining 14% reside interstate, including 8% in New South Wales.

Geographical distribution of Victorian game licence holders



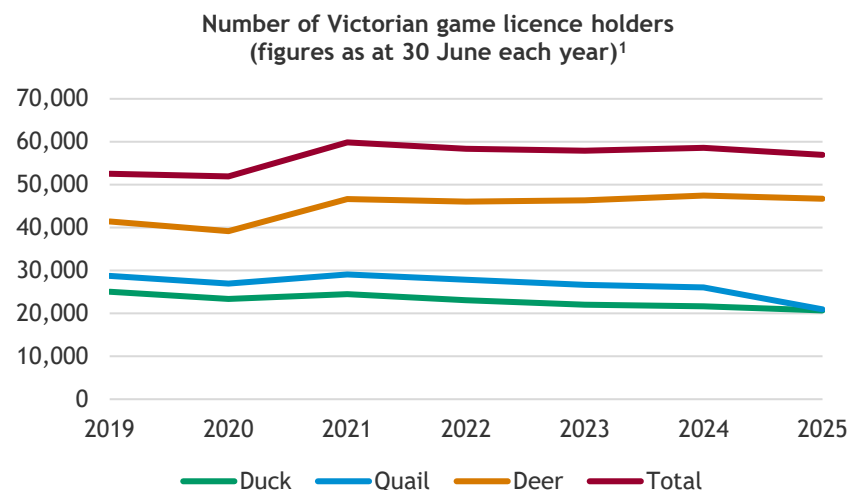
- 1 Executive summary
- 2 Introduction
- 3 Key market insights
- 4 Approach to the study
- 5 Economic contribution
- 6 Social benefits
- 7 Volunteerism
- 8 Appendices

Changes in the number of game licence holders since 2019

Since 2019, the total number of Victorian game licence holders increased by 8% from 52,551 to 56,965. A key driver of this growth is a 13% increase in deer licences. Over the same period, duck and quail licences have declined by 17% and 27%, respectively.

Changes in the number of game licence holders since 2019

Since 2019, the total number of Victorian game licence holders has increased by 8% from 52,551 to 56,965. This growth was driven by a 13% increase in deer licences (41,415 to 46,743), a 17% decline in duck licences (25,042 to 20,685) and 27% decline in quail licences (from 28,717 to 20,940).



Parliamentary inquiry into Victoria’s recreational native bird hunting arrangements (2023)

In August 2023, the Select Committee tabled its Parliamentary inquiry into recreational native bird hunting arrangements. The inquiry received more than 10,000 submissions, making it the largest response to a parliamentary inquiry in Victoria’s history. The inquiry examined animal welfare, compliance and regulatory settings in relation to duck and quail hunting.

Government response to Parliamentary inquiry

In response to the Select Committee's Parliamentary inquiry, the Victorian Government strengthened gamebird licencing requirements in 2025, with implementation overseen by the Game Management Authority (GMA). The key changes included:

- **Mandatory online education and testing modules** for new gamebird licence holders from 2025, with requirements extending to renewing licence holders from 2026 onwards
- **The removal of automatic quail licencing for duck licence holders in 2025**, requiring separate education modules and testing to acquire or renew a licence to hunt quail

These changes have occurred alongside a period of declining duck and quail licence numbers. However, the decline in native gamebird hunters predates the introduction of these changes, and it is therefore unclear to what extent there is any correlation with the observed trends.

Broader legislative changes

The Wildlife (Game) Regulations 2024 introduced several changes for the 2025 hunting season:

- For deer hunting, the regulations allowed the daytime use of handheld thermal imaging devices*
- For duck hunting, electronic acoustic callers were banned
- The regulations also commenced the phase-out of toxic lead ammunition across all game hunting activities

¹ Game Management Authority. *Annual Reports*. Available [here](#). Note: some hunters hold licences endorsed for multiple species.

1	Executive summary
2	Introduction
3	Key market insights
4	Approach to the study
5	Economic contribution
6	Social benefits
7	Volunteerism
8	Appendices

Recreational hunting in Victoria

A game licence issued by the GMA is required to hunt declared game species in Victoria. Licence types, hunting methods, season dates and bag limits vary by species. Declared pest animals may be hunted with a firearms licence, without a game licence, and with no bag or season limits.

Licencing requirements for declared game and pest species¹

A game licence issued by the GMA is required to hunt declared game species in Victoria. Licence types are species-specific.

There are two types of **deer hunting licences**:

- Deer (stalking) licences
- Deer (stalking and hounds) licences

There are two types of **game bird hunting licences**:

- Game Birds (including duck) licences, which authorise the hunting of ducks
- Game Birds (not including duck) licences, which authorise the hunting of quail and non-indigenous game birds

Non-indigenous game birds may also be hunted under a Private Game Bird Reserve Licence where hunting occurs on approved private game bird reserves.

Declared **pest species** may be hunted without a game licence, however hunters need to complete a ‘Registration of interest to hunt pest animals on Crown land’ with the Department of Energy, Environment and Climate Action. Traditional Owners are exempt from licence requirements when hunting in accordance with a Natural Resource Agreement under the *Traditional Owners Settlement Act 2010*.

Permitted hunting methods¹

Three hunting methods are permitted in Victoria.

1. Hunting with a firearm

Hunting with a firearm is the most common hunting method. Hunters must hold a current firearms licence issued by Victoria Police or an equivalent interstate authority and all firearms must be registered. Deer may be hunted using centrefire rifles, muzzle-loading rifles or

smooth-bore firearms. Ducks, quail and non-indigenous game birds may only be hunted using shotguns no greater than 12 gauge.

2. Hunting with a bow or crossbow

Deer may be hunted using longbows, recurve bows, compound bows or crossbows, provided minimum draw-weight requirements are met.

3. Hunting with a dog

The use of dogs is regulated under the Wildlife (Game) Regulations 2024. Gundogs may be used for hunting game birds and deer, excluding Hog Deer. Deer hunting dogs may only be used for deer, excluding Hog Deer, while hounds may only be used to hunt Sambar Deer.

Hunting seasons and bag limits¹

Season dates and bag limits by species are outlined in the table below.

Species/hunting method	Season dates	Daily bag limit
Sambar deer (stalking only)	All year	No limit
Sambar deer (hound hunting)	April - November	No limit
Red deer	All year	No limit
Fallow deer	All year	No limit
Chital deer	All year	No limit
Rusa deer	All year	No limit
Hog deer	April	1 male and 1 female
Duck	3 rd Wednesday in March to 2 nd Monday in June	Varies from year-to-year based on annual abundance estimates
Quail	1 st Saturday in April to 30 June	20
Introduced game birds	All year	No limit
Pest animals	All year	No limit

¹ Game Management Authority. *Hunting*. Available [here](#).

3

Key market insights: Drivers and barriers to hunter participation



1	Executive summary
2	Introduction
3	Key market insights
4	Approach to the study
5	Economic contribution
6	Social benefits
7	Volunteerism
8	Appendices

Drivers of participation for existing participants

Access to land and supporting infrastructure enable participation in recreational hunting, while key motivations include food harvesting, time spent outdoors, family tradition and social connection. The relative importance of these motivations varies by species.

Enablers of participation

Stakeholders indicated that participation is enabled by:

- **Access to land and supporting infrastructure:** Participation is fundamentally enabled by access to land. Without land access, participation and expenditure would decline sharply. Access via well-maintained roads and tracks determines whether hunting areas can be reached, while the availability of short-stay accommodation supports longer trips and higher local spending.

Motivations for participation

Stakeholders indicated that participation is motivated by:

- **Food harvesting:** The ability to harvest meat for personal consumption is a core motivation, particularly for deer, duck and pest animal hunters. This motivation reflects a preference for self-sourced meat.
- **Physical and mental wellbeing benefits of spending time outdoors:** Spending time outdoors delivers significant physical and mental wellbeing benefits, including stress reduction, improved mental health and a sense of self-reliance. This supports repeat participation even when harvest outcomes are uncertain.
- **Family tradition:** Recreational hunting is often embedded in family identity and passed down across generations, particularly in hound hunting. For example, 61% of Victorian Hound Hunters Incorporated (VHHI) members are 2nd to 5th generation hound hunters. In contrast, adult-onset participation is more common among deer stalkers and duck hunters, who are more motivated by food sourcing and connection to nature.
- **Social connection:** Participation often occurs with friends, family or hunting association members. This strengthens social bonds and reinforces safe, ethical behaviour through peer norms.

Primary motivations by species

Survey respondents identified their top five motivations for hunting. The relative importance of these motivations differs by species. Percentages in brackets represent the share of respondents selecting each motivation in their top five.

Motivation	 Deer	 Duck	 Quail
Food harvesting	77%	73%	74%
Enjoyment	66%	66%	69%
Spending time outdoors	65%	59%	58%
Pest control ¹	46%	-	-
Continuing a family or cultural tradition	41%	59%	58%
Spending time with friends	-	44%	42%

¹ Pest control does not imply that deer are classified as a pest species, but rather that some deer hunters are also motivated to control pest species (e.g. foxes).

1	Executive summary
2	Introduction
3	Key market insights
4	Approach to the study
5	Economic contribution
6	Social benefits
7	Volunteerism
8	Appendices

Barriers to increased participation for existing participants

Restricted access to land and supporting infrastructure is the primary barrier to increased participation for existing participants. Increased participation is also constrained by wetland conditions, pest control programs, testing requirements and an ageing participant base.

Barriers to increased participation for existing participants

Stakeholder feedback highlighted that increased participation is constrained by:

- **Restricted access to land and supporting infrastructure:** Access constraints are the primary barrier to participation, as they directly limit where and when hunting can occur. This includes poor road and track maintenance, which restricts access to hunting areas. Reduced availability of short-stay accommodation can also affect trip patterns and may be influenced by policy settings such as the short-stay levy.
- **Wetland condition and environmental water management (duck hunting):** Variability in rainfall and the timing of water extraction affects how much water State Game Reserves hold. When wetlands are dry, participation in duck hunting declines.
- **Baiting programs and mandatory buffer periods (hound hunting):**¹ Pest animal control programs require temporary closures of hunting areas to manage risks to hounds. In some cases, this can reduce available hunting days by up to an estimated 25% of the season.
- **Additional testing requirements:** Recent changes to licencing requirements include mandatory online education and testing modules for gamebird licence holders and the removal of automatic quail licencing for duck licence holders.
- **Ageing participant base:** The recreational hunting population is ageing, with a median age of 46 compared to 38 for the Victorian population.²

Barriers to participation by species

Survey respondents rated a range of barriers to increased participation on a scale from 0 (no barrier) to 10 (major barrier). Most barriers were rated moderate to low in severity, indicating that they are not prohibitive.

Barrier ratings by species are outlined in the table below.

Barrier	Deer rating	Duck rating	Quail rating	Overall rating
Ease of access to private land for hunting	6.6	6.0	6.0	6.5
Ease of access to public hunting locations	6.0	6.2	6.3	6.1
Time taken to reach hunting locations	5.5	4.9	5.0	5.4
Accessible information about recreational hunting locations	4.6	4.7	4.8	4.6
Facility availability (e.g. campgrounds huts near hunting locations)	4.5	4.6	4.6	4.5
Time taken to obtain relevant authorisations/accreditations	4.3	5.0	4.8	4.5
Cost of hunting equipment	4.3	4.4	4.4	4.3
Accessible information about recreational hunting in general	4.4	4.3	4.4	4.3
Not wanting to waste meat	3.8	3.8	3.7	3.8
Availability of hunting equipment	3.5	3.4	3.5	3.4
Insufficient accredited professional hunting guides	2.8	2.7	2.7	2.8

¹ Baiting programs involve the use of toxic baits on public land to control pest animals. A mandatory buffer period (typically around three weeks) applies following baiting to protect hounds from exposure, allowing time for baits to degrade and poisoned animals to be removed.

² ABS. *Victoria - 2021 Census All persons QuickStats*. Available [here](#).

1	Executive summary
2	Introduction
3	Key market insights
4	Approach to the study
5	Economic contribution
6	Social benefits
7	Volunteerism
8	Appendices

Enabling participation in recreational game hunting

The Victorian Government is addressing access, information and infrastructure barriers to increased participation by expanding public land access, establishing Fishing, Hunting and Outdoor Victoria, a Land and Aquatic Access Panel and investing in hunting huts.



Expanded national park access

The Victorian Government has expanded recreational hunting in East Gippsland to allow seasonal deer hunting in Errinundra and Snowy River national parks. The changes, effective from 15 February 2026, enable seasonal deer stalking across an additional 130,000 hectares of national park. Also, Mount Cole Game Sanctuary in western Victoria was revoked in late 2025, meaning that deer hunting is now permitted in the Mount Cole State Forest.

This expanded access to seasonal deer stalking on public land adds to existing opportunities for licensed hunters, supporting outdoor recreation and contributing to the control of wild deer in parks across Victoria.



Fishing, Hunting and Outdoor Victoria

The Victorian Government is strengthening the outdoor recreation sector by bringing together the Victorian Fisheries Authority and the GMA to form Fishing, Hunting and Outdoor Victoria (FHOV). FHOV will initially focus on increasing participation in activities such as hunting, fishing, four-wheel driving and off-grid camping, before expanding to support other outdoor recreation activities. FHOV will create a single point of information for bush users.

FHOV will also have expanded functions for outdoor recreation, including game hunting, to support participation, optimise social, cultural and economic benefits, and improve access to public land.



Land and Aquatic Access Panel

The Victorian Government will also establish a Land and Aquatic Access Panel (separate to FHOV) to provide advice to government on opportunities to improve community access to public land for outdoor recreation. This recognises the critical role that access to public land and aquatic areas play outdoor recreation activities, including game hunting.

It is envisaged that members will be appointed to represent public land managers, Traditional Owners, FHOV and key stakeholders.



Hunting huts

The Victorian Government has committed \$1 million for a pilot program to establish a new hunting hut and upgrade existing huts to make it easier for recreational deer hunters to safely harvest more animals. The huts will feature basic facilities and secure meat safes, allowing recreational hunters to safely and sustainably harvest more deer, store venison and extend their trips. With better meat storage, recreational hunters will be able to bring home more venison and support positive biodiversity outcomes in sensitive areas. The Government is collaborating with hunting and community groups to help guide how the huts are delivered, ensuring they meet the needs of recreational hunters.

Barriers addressed

- | | | | |
|-----------------------------------|---|-------------------------|-----------------------------------|
| ✓ Access to public land | ✓ Accessible information about hunting locations and hunting in general | ✓ Access to public land | ✓ Time to reach hunting locations |
| ✓ Time to reach hunting locations | | ✓ Facility availability | |

4

Approach to the study



1	Executive summary
2	Introduction
3	Key market insights
4	Approach to the study
5	Economic contribution
6	Social benefits
7	Volunteerism
8	Appendices

Survey scope and distribution

BDO, in partnership with AMR, designed and delivered an online survey of Victorian game licence holders. The survey received 2,583 responses (4.5% of licence holders) and was broadly representative across species, gender and age.

Survey scope

BDO worked with DJSIR to define the scope of the survey in line with the objectives of the study. BDO partnered with AMR to design, program and deliver the survey, drawing on AMR’s experience delivering surveys for similar recreational hunting studies in Victoria, New South Wales and Tasmania.

Survey development and testing

The survey was designed and tested to ensure clarity, logical flow and ease of completion. AMR reviewed the survey to confirm that each question was clearly understood and that the sequence of questions supported a consistent respondent experience. The draft questionnaire was received on 19 December 2025 and subsequently programmed and tested by AMR, with the final questionnaire approved by DJSIR on 30 January 2026.

Survey distribution

Contact details for Victorian game licence holders were obtained from the GMA licence database, which includes licence holder name, email and licence type. Licence holders are notified at the time of application that they may be contacted for research purposes. Approximately 90% of licence holders have a registered email address with GMA.

Unique survey links were issued to support tracking and de-duplication, with three reminders to maximise response. A generic survey link was also promoted on GMA’s website and social media channels, with duplicate responses removed through validation checks.

The survey was open to all game licence holders, regardless of where they live. A Computer-Assisted Telephone Interview (CATI) top-up was not required, as achieved sample proportions were considered appropriate.

Fieldwork delivery

The survey was administered online, with responses collected over a four-week fieldwork period. Fieldwork commenced on 6 February 2026, with survey invitations issued within two business days of launch and reminder emails issued on a weekly basis to maximise response rates. Fieldwork closed on 8 March 2026, with the final dataset delivered on 18 March 2026.

1	Executive summary
2	Introduction
3	Key market insights
4	Approach to the study
5	Economic contribution
6	Social benefits
7	Volunteerism
8	Appendices

Survey design and weighting

Survey responses were weighted to ensure total direct expenditure estimates are reflective of the Victorian game licence holder population, accounting for variation in spending behaviour across species, gender and age.

Survey data collected

The survey collected data on:

- **Trip expenditure** from respondents’ most recent recreational hunting trip (e.g. fuel, groceries, ammunition, accommodation), including spend amounts, purchase locations and the number of trips undertaken in the past 12 months.
- **Non-trip expenditure** over the past 12 months related to recreational hunting activities (e.g. firearms, equipment and vehicles), including spend amounts and purchase locations.
- **Motivations to hunt**, including food harvesting, enjoyment, spending time outdoors, pest control and family or cultural tradition.
- **Barriers to participation**, including travel time, access to hunting locations, availability of supporting infrastructure (e.g. campgrounds) and access to information.
- **Personal wellbeing** assessed across seven metrics, including standard of living, health, achievement in life, personal relationships, safety, sense of community and future security.
- **Social capital**, reflecting social connectedness and access to support through local networks, including time spent with friends and family and a sense of belonging within the community.
- **General health**, measured using a five-point scale from poor to excellent.
- **Volunteer activity**, including activity type, time spent, location and organisations involved.

Species quota and assignment

Many recreational hunters are licensed to hunt multiple species. To avoid double counting of expenditure, while ensuring sufficient sample sizes for less commonly hunted species, respondents were assigned to a single species for expenditure questions using the following hierarchy:¹

- | | |
|----------|-----------|
| 1. Quail | 5. Goat |
| 2. Duck | 6. Fox |
| 3. Deer | 7. Rabbit |
| 4. Pig | |

Respondents were asked to report expenditure only for their assigned quota species.

Survey weighting

A review of the survey data found that expenditure varied by species licensed to hunt, age and gender. Survey responses were weighted across these characteristics to ensure that total direct expenditure estimates were reflective of the Victorian game licence holder population.

While respondents were only asked about expenditure for their assigned quota species, all expenditure was captured at the population level through the weighting approach. The sample was representative across species, age and gender, and responses were weighted based on the game species respondents are licensed to hunt (as population data was only available for these species), ensuring expenditure across all hunting activity is reflected in the aggregate results.

This approach is more robust than applying a uniform sample-to-population weighting across all responses, as it avoids over- or under-estimating expenditure for different groups of hunters.

¹ While the survey included questions relating to hunting game birds at licensed game bird farms, no survey responses were received from this cohort. Consequently, hunting game birds at licensed game bird farms could not be separately analysed. The number of licences issued to hunt game birds at licensed game bird farms is relatively small.

Economic contribution methodology

GSP and FTE employment impacts were estimated using BDO’s in-house RISE input-output model, which captures direct and indirect (flow-on) effects across the Victorian economy.

Direct expenditure

Economic contribution was estimated by first calculating total direct hunting related expenditure in Victoria. Total expenditure was estimated by combining trip and non-trip expenditure reported in the survey and scaling this from the sample to the population using the weighting approach outlined on the previous page. These expenditure estimates were then prepared for modelling by:

- Converting them from purchasers’ prices to basic prices (by removing taxes, margins and imports)
- Allocating them to the relevant sectors where the spending occurred

This produced the direct expenditure profile used in modelling.

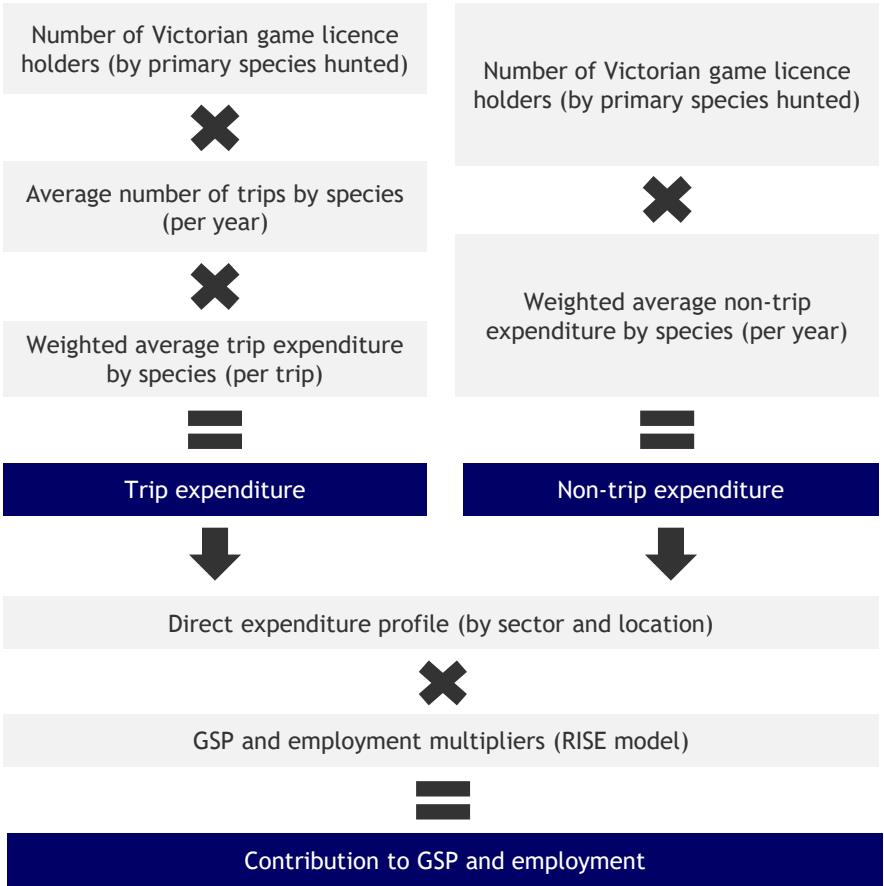
Economic contribution

The direct expenditure profile was input into the economic contribution model, which applied industry-specific multipliers.

The key metrics calculated were:

- **Gross State Product (GSP):** The contribution to Victoria’s GSP generated by recreational hunting expenditure undertaken within the state. GSP represents total expenditure less the cost of goods and services (including imports) used in production, capturing the net value added to the Victorian economy.
- **Full-time equivalent (FTE) employment:** The number of FTE jobs supported by recreational hunting expenditure within Victoria. This reflects the labour required to produce the goods and services demanded by this activity.

Simplified methodology



1	Executive summary
2	Introduction
3	Key market insights
4	Approach to the study
5	Economic contribution
6	Social benefits
7	Volunteerism
8	Appendices

Stakeholder consultations

BDO consulted with 15 industry stakeholders, including 8 hunting associations, 3 retailers and 4 tourism bodies.

Purpose of consultations

BDO undertook stakeholder consultations to complement survey findings and provide qualitative insights into:

- Drivers and barriers to hunter participation
- Factors influencing expenditure and GSP
- Volunteerism and community contribution

Approach to consultations

Stakeholders were identified in collaboration with DJSIR during the research and design phase to ensure broad industry coverage.

Stakeholders were contacted in advance and provided with background information to support participation.

BDO conducted a combination of in-person and online interviews with representatives across the recreational hunting industry, including:

- 8 hunting associations
- 3 retailers
- 4 tourism bodies

Consultations were undertaken in February 2026, with findings progressively shared with DJSIR. A consolidated set of findings were presented to DJSIR on 23 March 2026.

Acknowledgement

BDO thanks all stakeholders who participated in consultations and provided additional data and insights, including:

Hunting associations

1. Australian Deer Association (Vic.)
2. Field and Game Australia Incorporated
3. Para Park Co-Operative Game Reserve
4. Sporting Shooters Association of Australia (Vic.)
5. Victorian Deer Association
6. Victorian Duck Hunters Association
7. Victorian Game and Deer Stalking
8. Victorian Hound Hunters Incorporated

Retailers

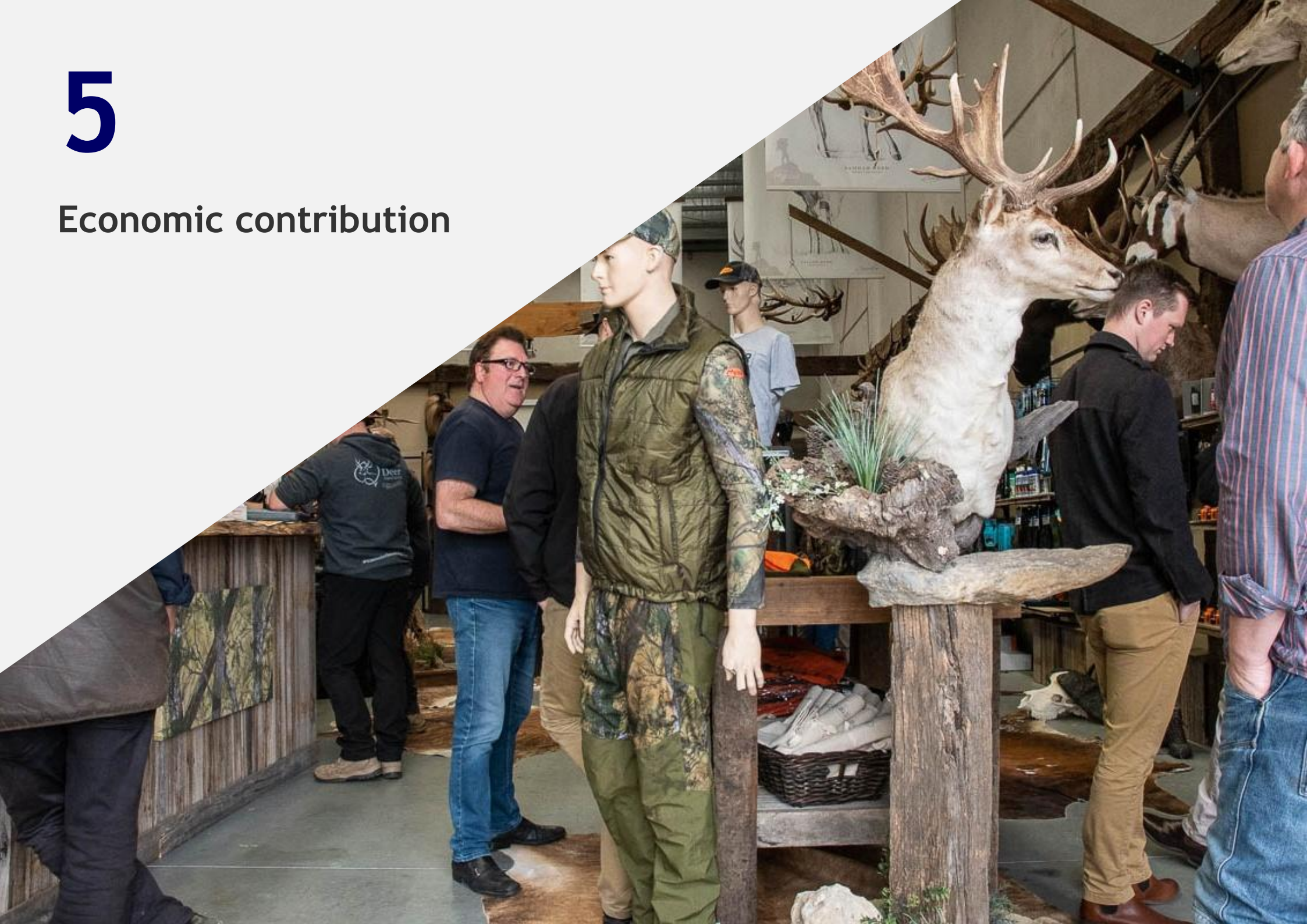
1. Beretta Australia
2. H Rehfish & Co
3. Trelly’s Outdoor

Tourism bodies

1. Destination Gippsland
2. Loddon Shire Council
3. Murray Regional Tourism
4. Tourism North East

5

Economic contribution



1	Executive summary
2	Introduction
3	Key market insights
4	Approach to the study
5	Economic contribution
6	Social benefits
7	Volunteerism
8	Appendices

Economic contribution of recreational hunting to Victoria

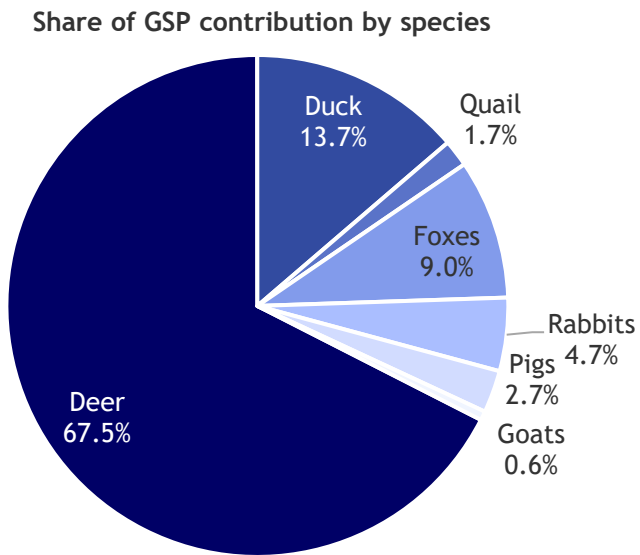
Game licensed recreational hunting contributed an estimated \$559.0 million in GSP and supported 3,703 FTE jobs in Victoria in 2025. 83% of total GSP was driven by game species and 17% by pest species.

Economic contribution by species

Deer was the dominant driver of economic contribution, accounting for 67.5% of direct expenditure, GSP and employment. Duck was the clear second contributor at 13.7%, while quail contributed 1.7%.

Pest species made a meaningful contribution (17.0% combined), led by foxes (9.0%). Rabbits (4.7%), pigs (2.7%) and goats (0.6%) represented a relatively small share of total contribution.

Collectively, employment supported by recreational hunting of these species increased from 3,138 FTE jobs in 2019 to 3,703 FTE jobs in 2025.



Metric	Game species			Pest species				Total
	Deer	Duck	Quail	Foxes	Rabbits	Pigs	Goats	
Direct expenditure								
Trip	\$184.6m	\$30.2m	\$2.4m	\$51.2m	\$26.8m	\$15.5m	\$3.3m	\$314.0m
Non-trip ¹	\$194.7m	\$46.3m	\$7.1m	N/A	N/A	N/A	N/A	\$248.2m
Total	\$379.4m	\$76.5m	\$9.5m	\$51.2m	\$26.8m	\$15.5m	\$3.3m	\$562.2m
Gross State Product ²								
Direct	\$136.3m	\$27.4m	\$3.4m	\$18.7m	\$9.8m	\$5.6m	\$1.2m	\$202.4m
Indirect	\$241.0m	\$49.4m	\$6.3m	\$31.7m	\$16.6m	\$9.6m	\$2.0m	\$356.5m
Total	\$377.3m	\$76.7m	\$9.7m	\$50.4m	\$26.4m	\$15.3m	\$3.2m	\$559.0m
Employment (FTE) ²								
Direct	1,126	232	31	146	76	44	9	1,665
Indirect	1,378	282	36	181	95	55	12	2,039
Total	2,503	514	67	328	172	99	21	3,703

¹ Non-trip expenditure is attributed to game species only, not pest animals. While pest species may be the primary target of some recreational hunting trips, Victorian game licence holders are licensed to hunt game species and non-trip expenditure is therefore attributed to game species only.

² Estimated using BDO’s in-house RISE input-output model.

- 1 Executive summary
- 2 Introduction
- 3 Key market insights
- 4 Approach to the study
- 5 Economic contribution
- 6 Social benefits
- 7 Volunteerism
- 8 Appendices

Economic contribution by region

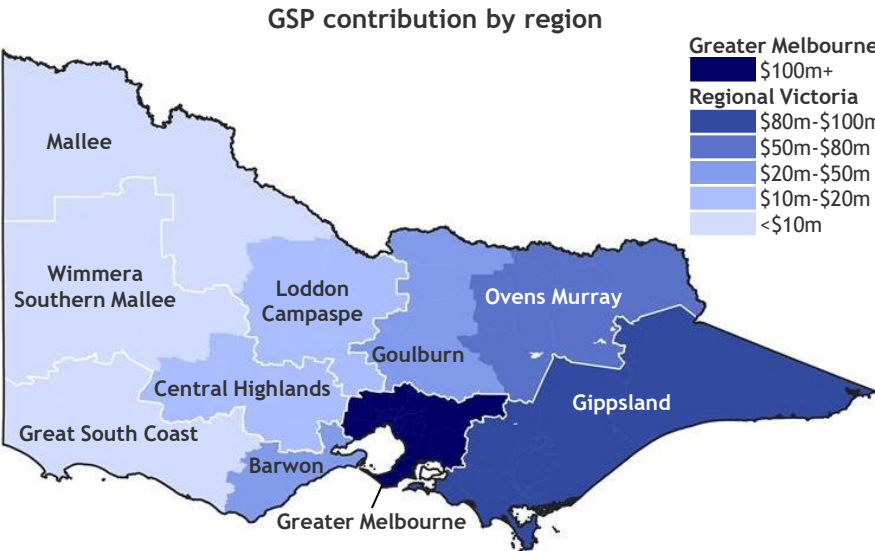
Regional Victoria accounted for over 70% of economic contribution, led by Gippsland (15%) and Ovens Murray (11%). This reflects the fact that around 70% of trip expenditure and 60% of non-trip expenditure occurred in regional Victoria.

Economic contribution by region

Outside of Greater Melbourne, Gippsland (15%) and Ovens Murray (11%) were the largest contributing regions, with Barwon (4%), Goulburn (4%) and Loddon Campaspe (3%) rounding out the top five.

Gippsland and Ovens Murray also have the largest concentrations of Victorian game licence holders residing in regional Victoria, accounting for 14% and 6% of licence holders, respectively.

Deer was the primary driver in both regions, accounting for 61% of GSP and FTE in Gippsland and 74% in Ovens Murray. Duck was the second largest contributor in Gippsland (18%), while foxes were the second largest contributor in Ovens Murray (10%).



Region	Direct expenditure			GSP ¹	FTE ¹
	Trip	Non-trip	Total		
Greater Melbourne	\$91.6m	\$100.7m	\$192.2m	\$157.4m	1,077
Gippsland	\$89.8m	\$48.2m	\$138.1m	\$81.7m	584
Ovens Murray	\$62.6m	\$39.2m	\$101.8m	\$59.9m	447
Barwon	\$19.6m	\$13.8m	\$33.4m	\$21.4m	159
Goulburn	\$14.6m	\$15.5m	\$30.1m	\$20.3m	143
Loddon Campaspe	\$16.2m	\$13.6m	\$29.7m	\$18.4m	133
Central Highlands	\$10.3m	\$9.2m	\$19.5m	\$12.0m	88
Great South Coast	\$4.9m	\$3.4m	\$8.2m	\$5.1m	40
Mallee	\$2.3m	\$3.0m	\$5.3m	\$3.4m	25
Wimmera Southern Mallee	\$2.1m	\$1.7m	\$3.8m	\$2.2m	17
Inter-regional trade ²	-	-	-	\$177.2m	990
Total	\$314.0m	\$248.2m	\$562.2m	\$559.0m	3,703

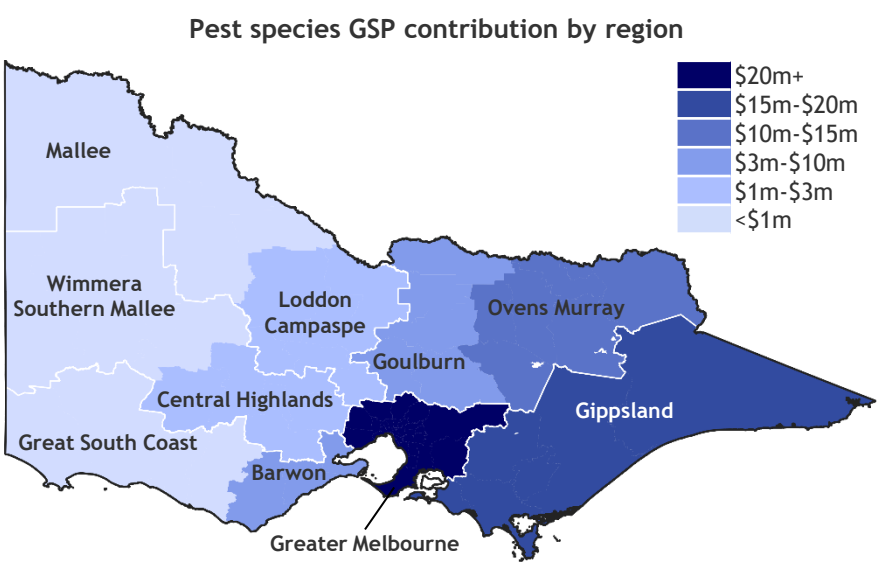
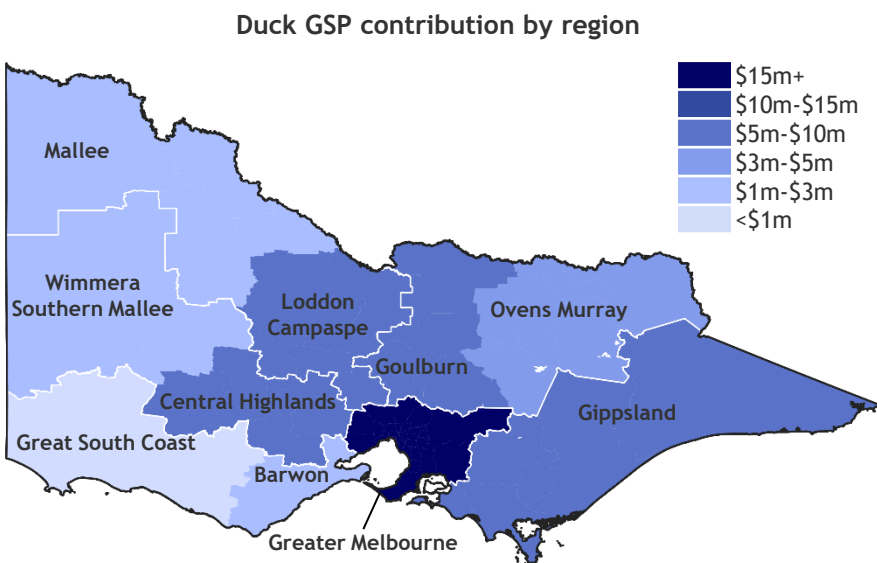
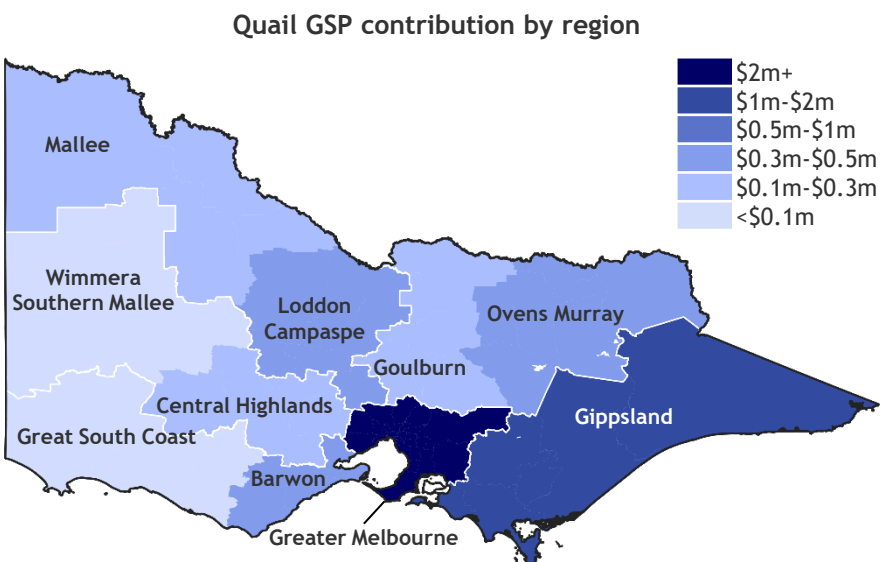
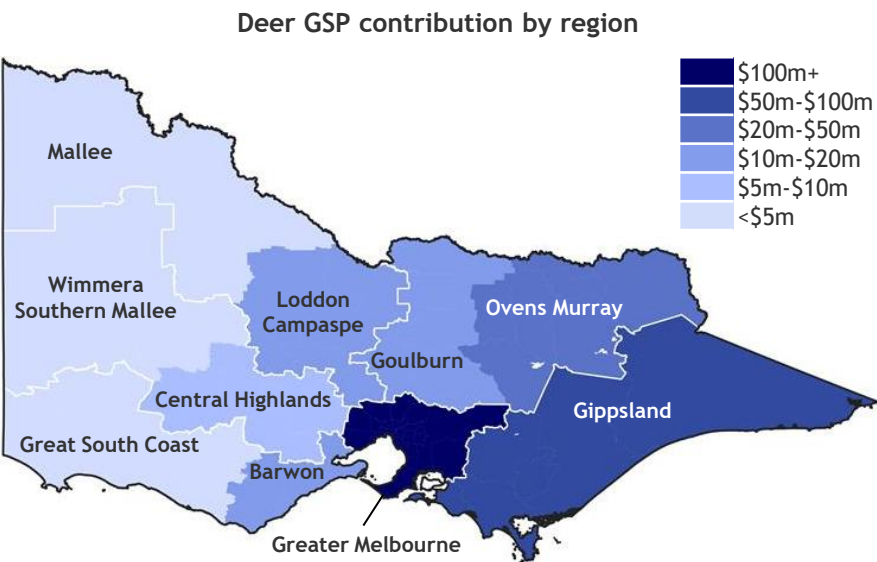
¹ Estimated using BDO’s in-house RISE input-output model.

² Indirect GSP and FTE attributed to inter-regional trade accounts for trade between regions where direct spending in one region generates indirect spending in other regions. For example, spending at a café in Gippsland may result in the café purchasing supplies from outside Gippsland, or employees spending income on goods and services from outside Gippsland.

- 1 Executive summary
- 2 Introduction
- 3 Key market insights
- 4 Approach to the study
- 5 Economic contribution
- 6 Social benefits
- 7 Volunteerism
- 8 Appendices

Economic contribution by region and species

Deer contribution is heavily concentrated in Greater Melbourne, Gippsland and Ovens Murray, whereas duck, pest and quail contributions are smaller and more dispersed across regions. This reflects both the distribution of game licence holders and the location of key hunting areas for each species.



1

Executive summary

2

Introduction

3

Key market insights

4

Approach to the study

5

Economic contribution

6

Social benefits

7

Volunteerism

8

Appendices

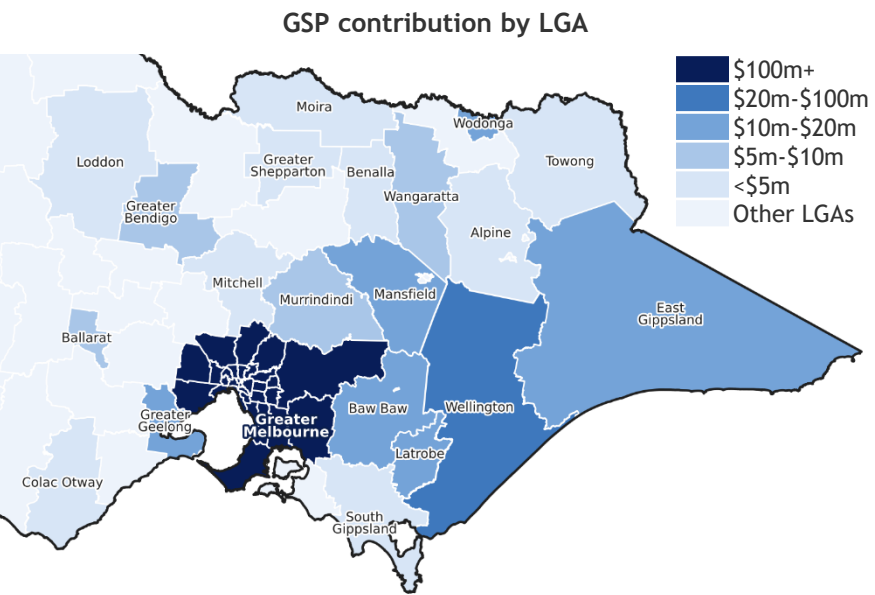
Economic contribution by LGA

The top 20 regional LGAs were concentrated in south-eastern Victoria. Wellington was the largest LGA contributor, followed by Mansfield, Baw Baw, East Gippsland and Wodonga.

Economic contribution by LGA

While economic contribution by LGA is broadly aligned with where Victorian game licence holders reside, it is also driven by the location of high-quality hunting areas and related retail and services.

For example, Mansfield, located within Victoria’s High Country, is only the 27th largest regional LGA by share of Victorian game licence holders but is the second largest contributor to regional GSP. This reflects its proximity to key deer hunting areas, with GMA data indicating that Mansfield had the highest number of deer hunting days and deer harvested of any Victorian town in 2025.¹ It also reflects the presence of established hunting-related retail and services.



LGA	Direct expenditure			GSP ²	FTE ²
	Trip	Non-trip	Total		
Greater Melbourne	\$91.6m	\$100.7m	\$192.2m	\$157.4m	1,077
Wellington	\$32.1m	\$8.2m	\$40.3m	\$20.1m	154
Mansfield	\$19.3m	\$17.0m	\$36.3m	\$16.7m	132
Baw Baw	\$18.8m	\$14.1m	\$32.9m	\$16.5m	129
East Gippsland	\$21.7m	\$10.9m	\$32.6m	\$15.9m	119
Wodonga	\$14.2m	\$12.1m	\$26.3m	\$12.6m	94
Latrobe	\$13.5m	\$12.8m	\$26.4m	\$11.9m	85
Greater Geelong	\$12.2m	\$10.3m	\$22.5m	\$11.2m	87
Greater Bendigo	\$5.5m	\$12.5m	\$17.9m	\$9.3m	66
Wangaratta	\$8.8m	\$6.7m	\$15.5m	\$7.7m	64
Ballarat	\$6.1m	\$7.4m	\$13.5m	\$6.4m	50
Murrindindi	\$10.1m	\$2.3m	\$12.3m	\$5.9m	66
Benalla	\$8.2m	\$1.8m	\$9.9m	\$4.6m	42
Mitchell	\$3.8m	\$4.7m	\$8.5m	\$4.0m	34
Colac Otway	\$3.3m	\$3.2m	\$6.5m	\$3.0m	24
Alpine	\$5.7m	\$0.7m	\$6.4m	\$3.0m	24
Greater Shepparton	\$1.7m	\$4.0m	\$5.7m	\$2.6m	20
Towong	\$4.2m	\$0.7m	\$4.9m	\$2.4m	25
Loddon	\$3.8m	\$1.0m	\$4.8m	\$2.4m	25
South Gippsland	\$2.6m	\$0.7m	\$3.3m	\$1.8m	16
Moira	\$1.2m	\$2.4m	\$3.6m	\$1.7m	13
Other	\$25.8m	\$13.9m	\$39.7m	\$241.9m	1,358
Total	\$314.0m	\$248.2m	\$562.2m	\$559.0m	3,703

¹ GMA. 2025 Deer harvest report. Available [here](#).
² Estimated using BDO’s in-house RISE input-output model.

- 1 Executive summary
- 2 Introduction
- 3 Key market insights
- 4 Approach to the study
- 5 Economic contribution
- 6 Social benefits
- 7 Volunteerism
- 8 Appendices

Factors influencing hunter expenditure and GSP

Species hunted, hunting method and trip patterns shape both the amount and location of hunter expenditure, driving significant spend into regional Victoria.

Consultations highlighted several factors affecting the amount and location of trip and non-trip expenditure.

Trip expenditure

- **Trip expenditure varies by species and hunting method:** Deer stalkers and pest hunters tend to undertake shorter trips, with relatively lower accommodation spend but ongoing expenditure on fuel, supplies and equipment. In contrast, duck and hound hunters are more likely to undertake longer trips with higher spend on accommodation, food services and other local retail.
- **Trip expenditure is concentrated in regional Victoria:** Recreational hunters make a deliberate effort to spend locally to support regional communities, particularly where trip costs are otherwise low (e.g. free or low-cost camping). As a result, a substantial share of trip expenditure is spent in regional Victoria.
- **Gateway towns capture a significant share of expenditure:** Nearby towns often capture expenditure on accommodation, fuel, food services and retail even when hunting occurs elsewhere.

Regional retail demand

Regional stores often outperform metropolitan stores in sales because metropolitan-based hunters tend to purchase fuel, groceries, camping gear and hunting equipment locally on arrival.

- **Trip patterns are not materially influenced by season length, bag limits or environmental conditions:** The number of days hunted per hunter is relatively consistent across seasons. While shorter or restricted seasons (e.g. during the COVID-19 pandemic) may affect participation in some years, the number of days hunted per hunter has remained broadly stable over time irrespective of season length, bag limits or environmental conditions (6-8 days for deer hunters, 3-5 days for duck hunters and ~1 day for quail hunters).^{1,2}

Non-trip expenditure

- **Non-trip expenditure also varies by species and hunting method:** For example, deer stalkers and pest hunters tend to spend on high-end optics (e.g. scopes, rangefinders and thermal imaging devices), while hound hunters of Sambar deer incur ongoing costs associated with hound upkeep (e.g. food, veterinary care, breeding and welfare) and specialised equipment (e.g. GPS collars).
- **Non-trip expenditure is also concentrated in regional Victoria,** although to a lesser extent than trip expenditure (approximately 60% compared to 70%).

Growth in high-end optics

Retailers report that high-end optics are the fastest-growing non-trip expenditure category. This equipment can retail for up to \$10,000, with rapid technological improvements encouraging regular upgrades among some hunters.

- **Demand has increased for ‘harvest your own meat’ products, including food-processing equipment and supplies:** This is a result of cost-of-living pressures and a growing preference to harvest, process and consume self-sourced meat.

Limited e-commerce adoption

E-commerce adoption in the recreational hunting industry remains limited relative to other industries. This reflects the industry’s older participant base, variable digital capability across regions and retailers, and restrictions on advertising firearms-related products through social media and online platforms.

¹ Game Management Authority. 2025 Victorian deer harvest report. Available [here](#).

² Game Management Authority. *Estimates of harvest for duck and Stubble Quail in Victoria 2025*. Available [here](#).

6

Social benefits



1	Executive summary
2	Introduction
3	Key market insights
4	Approach to the study
5	Economic contribution
6	Social benefits
7	Volunteerism
8	Appendices

Social benefits - Methodology

Social benefits were assessed using established wellbeing measures such as the Personal Wellbeing Index, as well as social capital and general health indicators aligned with the University of Canberra’s Regional Wellbeing Survey.

Benchmarking analysis

Survey results were benchmarked against the University of Canberra’s *Regional Wellbeing Survey* (RWS) to assess personal wellbeing, social capital and general health outcomes.

The RWS is an annual time series (since 2013) that tracks wellbeing across Australia over time, by state and between socio-demographic and industry groups.

Survey responses were equally weighted and converted to a 0-100 index to enable direct comparison with the RWS.

Personal Wellbeing Index

Personal wellbeing was measured using the Personal Wellbeing Index, a widely used measure of subjective wellbeing developed by the Australian Centre on Quality of Life, which captures satisfaction across key life domains.

Respondents were asked to rate their satisfaction, on a scale from 0 (completely dissatisfied) to 10 (completely satisfied), across seven life domains:

1. Standard of living
2. Health
3. Achieving in life
4. Personal relationships
5. Safety
6. Sense of community
7. Future security

Social Capital Index

Social capital was measured using the Social Capital Index (SCI), which is aligned with indicators used in the RWS and captures individuals’ sense of belonging, trust and connection within their local community. Respondents were asked to indicate the extent to which they agreed or disagreed with the following statements (where 1 = strongly disagree and 7 = strongly agree):

- I feel welcome in my social group/s
- I feel part of my community
- I belong in my community
- I feel like an outsider in my community
- My community is a great place to live
- This community copes well when faced with challenges
- I feel proud to live in this community
- This community has a bright future
- There’s good community spirit around here

General Health

General health was measured using a standard self-rated health question, consistent with the RWS, asking respondents to rate their overall health as excellent, very good, good, fair or poor.

Bivariate analysis

Exploratory bivariate analysis was undertaken to examine the relationship between motivations for hunting and personal wellbeing, social capital and general health, including whether these relationships are statistically significant ($p < 0.05$).

Personal Wellbeing Index

Victorian game licence holders reported higher scores across all seven Personal Wellbeing Index metrics, with an average score of 79.5, compared to 71.5 for the Victorian population.

Benchmarking analysis - Victorian population¹

Personal wellbeing was 8.0 index points higher than the Victorian population (79.5 vs 71.5).

The largest differences were observed in:

- **Personal relationships:** 12.8 index points higher
- **Achieving in life:** 12.2 index points higher
- **Health:** 10.3 index points higher

The smallest differences were observed in:

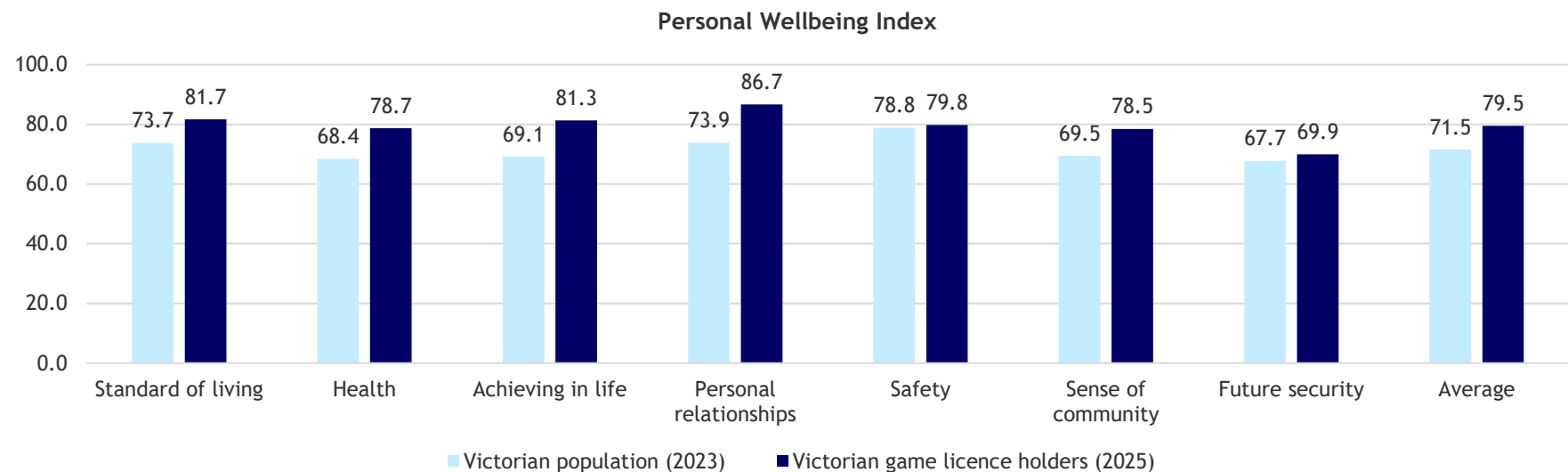
- **Safety:** 1.0 index point higher
- **Future security:** 2.2 index points higher

Bivariate analysis - motivations to hunt

Personal wellbeing scores were compared between respondents who selected each motivation in their top five and those who did not, with statistically significant differences identified.²

Higher wellbeing was observed among respondents motivated by:

- Spending time with family (81.0 vs 79.1)
 - Spending time outdoors (80.0 vs 78.7)
- Lower wellbeing was observed among respondents motivated by:
- Getting away from other people (73.5 vs 79.8)
 - Getting away from day-to-day life (77.1 vs 80.0)
 - Getting exercise (78.0 vs 79.9)



¹ University of Canberra. 2023 *Regional Wellbeing Survey data tables*. Available [here](#). Note: This was the most recent data available at the time of this study.

² Statistically significant at the 5% level ($p < 0.05$). Note: While wellbeing varies across some motivations, these differences may reflect underlying characteristics of individuals reporting these motivations.

Social Capital Index

Victorian game licence holders reported higher scores across eight of the nine Social Capital Index metrics, with an average score of 80.6, compared to 78.7 for the Victorian population.

Benchmarking analysis - Victorian population¹

Social capital was 1.9 index points higher than the Victorian population (80.6 vs 78.7).

The largest differences were observed in:

- I belong in my community: 8.2 index points higher
- I feel like an outsider in my community: 7.5 index points lower²
- I feel welcome in my social group/s: 6.6 index points higher

The smallest differences were observed in:

- There’s good community spirit around here: 1.2 index points higher
- This community has a bright future: 1.3 index points lower

Bivariate analysis - motivations to hunt

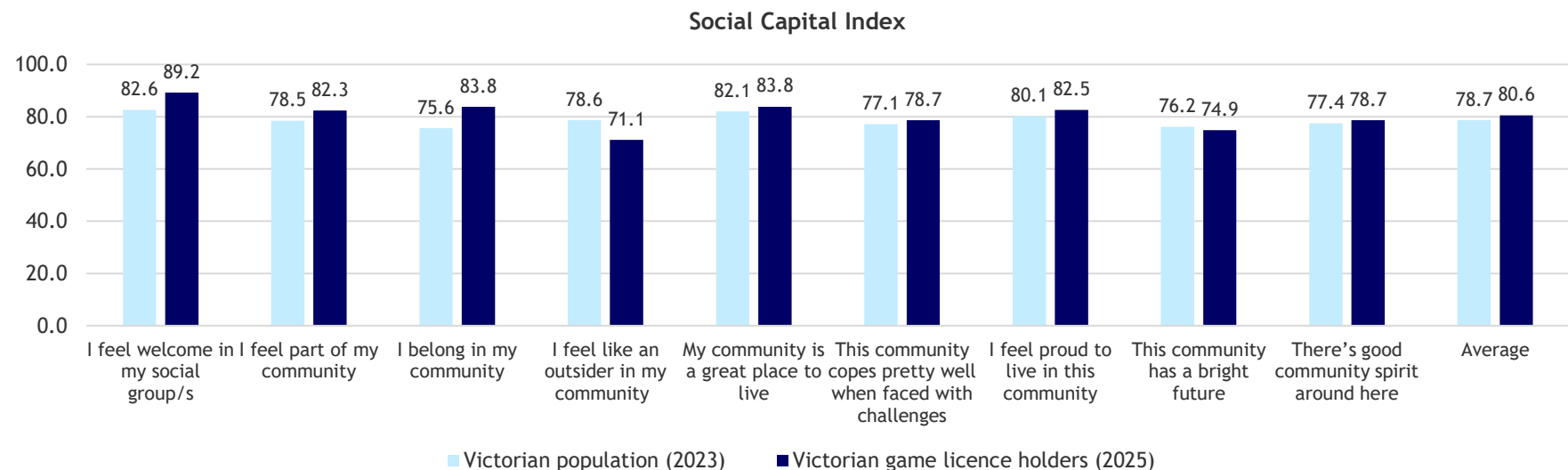
Social wellbeing scores were compared between respondents who selected each motivation in their top five and those who did not, with statistically significant differences identified.³

Higher social capital was observed among respondents motivated by:

- Spending time with family (82.5 vs 80.0)

Lower social capital was observed among respondents motivated by:

- Getting away from other people (73.5 vs 80.8)
- Getting away from day-to-day life (77.4 vs 81.2)
- Finding recreational hunting exciting (77.5 vs 80.8)



¹ University of Canberra. 2023 *Regional Wellbeing Survey data tables*. Available [here](#). Note: This was the most recent data available at the time of this study.

² Note: A lower score indicates a higher level of social capital for this metric.

³ Statistically significant at the 5% level ($p < 0.05$). Note: While wellbeing varies across some motivations, these differences may reflect underlying characteristics of individuals reporting these motivations.

General Health

Victorian game licence holders reported higher general health than the Victorian population by 11.5 index points (71.0 compared to 59.5). Over two-thirds of respondents reported excellent or very good health.

Benchmarking analysis - Victorian population¹

General health was 11.5 index points higher than the Victorian population (71.0 vs 59.5).

Among respondents:

- 22.2% reported **excellent** health
- 44.8% reported **very good** health
- 27.9% reported **good** health
- 4.7% reported **fair** health
- 0.3% reported **poor** health

Bivariate analysis - motivations to hunt

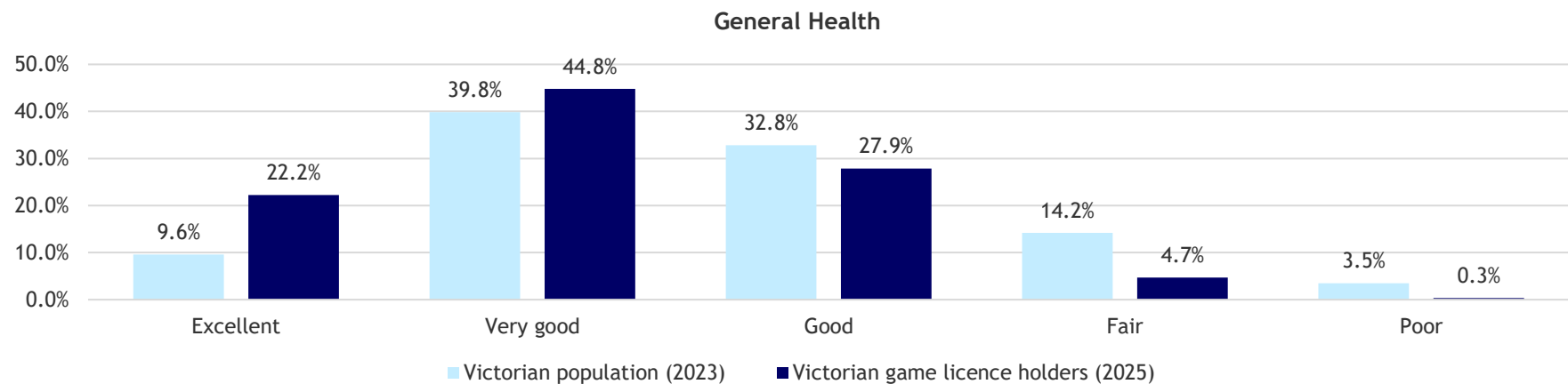
General health scores were compared between respondents who selected each motivation in their top five and those who did not, with statistically significant differences identified.²

Higher general health was observed among respondents motivated by:

- Hunting being challenging (73.3 vs 70.2)
- The enjoyment of hunting (72.9 vs 70.0)
- Continuing a family or cultural tradition (72.4 vs 69.8)
- Spending time in places that are special to them (72.4 vs 70.4)

Lower general health was observed among respondents motivated by:

- Getting away from day-to-day life (68.8 vs 71.4)
- Getting exercise (69.2 vs 71.5)
- Relaxing and unwinding (69.7 vs 71.5)
- Spending time with friends (69.9 vs 71.6)



¹ University of Canberra. 2023 *Regional Wellbeing Survey data tables*. Available [here](#). Note: This was the most recent data available at the time of this study.

² Statistically significant at the 5% level ($p < 0.05$). Note: While wellbeing varies across some motivations, these differences may reflect underlying characteristics of individuals reporting these motivations.

7

Volunteerism



1 Executive summary

2 Introduction

3 Key market insights

4 Approach to the study

5 Economic contribution

6 Social benefits

7 Volunteerism

8 Appendices

Volunteer contribution of recreational hunters

Victorian game licence holders reported an average of 41.8 volunteer hours in 2025, including 28.4 hours for pest control and 13.4 hours for other activities, undertaken with hunting associations, environmental groups, and community and emergency service organisations.

Key volunteerism insights



Pest control is the main volunteering activity

Recreational hunters spent 28.4 hours on average on pest control, accounting for 68% of total volunteer hours. This level of control is likely contributing to environmental outcomes through better pest management across public and private land.



Supporting conservation outcomes

Litter clearing and habitat restoration and contributed a further 9.3 hours (23%) towards improving environmental outcomes.



Benefits for communities

Volunteering was delivered in partnership with:

- Hunting associations (e.g. SSAA, Field & Game Australia)
- Environmental groups (e.g. Landcare, Trust for Nature)
- Community organisations (e.g. Scouts, Rotary)
- Emergency services organisations (e.g. SES, CFA)



Access-driven volunteering

Hunters often volunteer to access private land to hunt pest animals by undertaking unpaid work for landholders, such as fence repairs, track clearing and general property maintenance.

VOLUNTEER CONTRIBUTION¹



2.2 million
volunteer hours annually



\$55.7 million
indicative economic value

VALUE BREAKDOWN¹



\$37.9 million
pest control (68%)



\$17.8 million
other activities (32%)

Average volunteer hours by activity (2025)²

% of total

Pest control	28.4	68%
Litter clearing	4.9	12%
Habitat restoration	4.4	11%
4wd track maintenance	2.2	5%
Hiking track maintenance	0.8	2%
Other	1.0	2%

Volunteer hours were broadly consistent across species:

Deer: 42.6 hrs | Duck: 47.1 hrs | Quail: 52.0 hrs

¹ Based on average reported volunteer hours, Victorian game licence holders contributed an estimated 2.2 million volunteer hours in 2025. Valued at the National Minimum Wage (\$24.95 per hour as at 1 July 2025), this is equivalent to approximately \$55.7 million, comprising \$37.9 million for pest control and \$17.8 million for other volunteering. These estimates are indicative only and assume reported hours are representative of the broader population. Actual volunteering hours may differ.

² Estimates exclude upper outliers based on the interquartile range (IQR) rule (values exceeding $Q3 + 1.5 \times (Q3 - Q1)$). This corresponded to thresholds of >20 hours for all activities except pest control (>120 hours).

1	Executive summary
2	Introduction
3	Key market insights
4	Approach to the study
5	Economic contribution
6	Social benefits
7	Volunteerism
8	Appendices

Organised volunteer programs

Consultations highlighted significant contributions of the recreational hunting community to pest management, land stewardship and emergency response activities. These activities reduce the need for coordination and funding by public agencies.

Structured pest management programs¹

The Sporting Shooters’ Association of Australia’s (SSAA) **Cooperative Pest Animal Control Program** enables accredited volunteer shooters to undertake coordinated ground-shooting to control invasive pest species across parks and reserves managed by Parks Victoria. In doing so, the program reduces reliance on public resources. Between September 2021 and July 2025, 108 accredited volunteers contributed 5,185 hours, controlling 5,206 pest animals, including rabbits, goats, foxes and pigs.

SSAA’s **Farmer Assist Program** enables farmers and landholders to engage accredited volunteer shooters to assist with pest and feral animal control on private land. The program operates through an online platform linking landholders with qualified volunteers at no cost, reducing financial barriers to pest management. This supports improved coordination in land management, enables more timely responses to pest outbreaks and strengthens connections between recreational hunters and rural communities.

Ongoing land stewardship and environmental management¹

Volunteerism is a routine component of participation, particularly across land management and environmental stewardship. VHHI estimates that its members contribute at least 30 volunteer hours per year across activities such as bushland clean-ups, environmental monitoring and fire preparedness.

Community-led fundraising¹

Recreational hunting organisations and their members also contribute to conservation outcomes through collective fundraising and environmental investment. For example, members of Field & Game Australia have raised approximately \$2.4 million through the Wetlands Environmental Taskforce (WET) to support the staged acquisition (2006, 2010 and 2013) and ongoing restoration of the Heart Morass wetland in Victoria. These efforts have contributed to long-term habitat protection, wetland restoration, and biodiversity outcomes, demonstrating the capacity of volunteer-led initiatives to mobilise private funding for environmental purposes.

Emergency response and rapid mobilisation¹

Consultation also highlighted the capacity for rapid, community-led mobilisation in response to natural disasters. In January 2026, members of the recreational hunting community supported bushfire recovery efforts in Longwood, Victoria, assisting with logistics, coordination, and the humane euthanasia of fire-affected livestock and wildlife. The response was supported by community fundraising, generating more than \$70,000 in donations to assist affected households. This example demonstrates the ability of the recreational hunting community to mobilise practical skills, equipment, and coordination capacity to support emergency response and recovery efforts.

¹ Information and data provided by SSAA, VHHI, Field & Game Australia and Trelly’s Outdoor.

1	Executive summary
2	Introduction
3	Key market insights
4	Approach to the study
5	Economic contribution
6	Social benefits
7	Volunteerism
8	Appendices

Volunteer-led research and wildlife management

Recreational hunters contribute to wildlife research and management through population monitoring, data collection, reporting and habitat observation. Para Park Co-Operative Game Reserve on Sunday Island is a key example.

Case study: Para Park Co-Operative Game Reserve¹

Established in 1965, Para Park Co-Operative Game Reserve (Para Park) is a member-owned freehold game reserve on Sunday Island in Wellington Shire, Gippsland. It is approximately 215 kilometres south-east of Melbourne and is only accessible by boat from Port Albert. As of February 2026, Para Park has 171 members, including 101 game licence holders, alongside non-licensed members who visit for fishing and general recreation.

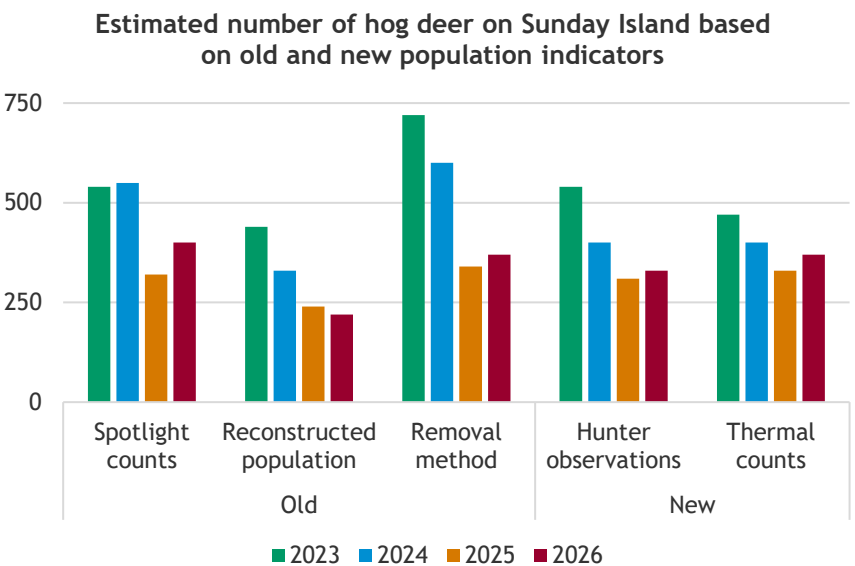
Para Park is responsible for managing the hog deer population and habitat on Sunday Island. Member hunting is the primary method used to regulate deer numbers, with formal management culls undertaken when harvest targets are not met. The reserve operates under a year-round management permit issued by the GMA, which allows hog deer to be hunted outside the gazetted April season. This flexibility is important for achieving the harvest levels required to effectively manage hog deer numbers on Sunday Island.

A defining feature of Para Park is its long-running calf capture and ear-tagging program, which began in the early 1970s and is led by members. Over time, this program has generated a large longitudinal dataset, including more than 3,000 harvested deer, over 1,100 tagged animals and extensive data on animal condition, mortality and reproduction. This dataset is used to support population estimation, monitor herd health and inform harvest targets for the upcoming season, including whether additional management culls are required.

Para Park also uses other methods to assess population size, including:

- **Spotlight counts** using night-time observation surveys
- **Reconstructed population analysis** based on harvest reports
- **Capture-mark-recapture modelling** using tagged animals
- **Hunter observations** through reported sightings
- **Thermal counts** using thermal imaging

The figure below illustrates how these methods were used to estimate population size between 2023 and 2026.



Why this matters

While each method produces different population estimates, together they provide a consistent view of a downward population trend. This is critical in an island environment with no natural predators, where populations of wildlife such as hog deer can increase rapidly if unmanaged.

Para Park demonstrates how structured, volunteer-led monitoring and active population management can reduce the need for publicly funded data collection, coordination and on-ground population control, while supporting evidence-based wildlife management outcomes in Victoria.

¹ Information and data provided by Para Park.

8

Appendices



1	Executive summary
2	Introduction
3	Key market insights
4	Approach to the study
5	Economic contribution
6	Social benefits
7	Volunteerism
8	Appendices
A	Trip expenditure
B	Non-trip expenditure
C	Region analysis
D	LGA analysis
E	Town analysis
F	Comparative analysis
G	Survey questionnaire
H	Limitations of the analysis
I	Changes in study scope
J	Potential future survey improvements

Appendix A - Trip expenditure by game and pest species

In 2025, Victorian game licence holders spent an estimated \$314.0 million on recreational hunting trips in Victoria. Nearly 70% of this expenditure was on game species, with the remaining 30% on pest species.

Item	Game species			Pest species				Total
	Deer	Duck	Quail	Foxes	Rabbits	Pigs	Goats	
Fuel	\$48.4m	\$7.1m	\$0.5m	\$13.0m	\$8.8m	\$6.9m	\$2.1m	\$86.7m
Groceries	\$33.0m	\$5.8m	\$0.3m	\$6.8m	\$5.0m	\$1.8m	\$1.0m	\$53.9m
Hunting equipment	\$29.3m	\$4.7m	\$0.3m	\$4.8m	\$0.8m	\$1.2m	\$0.0m	\$41.0m
Vehicle repairs	\$20.0m	\$2.5m	\$0.4m	\$5.9m	\$0.4m	\$0.0m	\$0.0m	\$29.2m
Ammunition	\$16.7m	\$4.8m	\$0.4m	\$11.7m	\$3.4m	\$1.3m	\$0.0m	\$38.4m
Takeaway and restaurant meals	\$18.5m	\$2.8m	\$0.2m	\$3.7m	\$3.6m	\$1.8m	\$0.1m	\$30.8m
Accommodation	\$12.7m	\$1.4m	\$0.2m	\$2.0m	\$2.7m	\$0.0m	\$0.0m	\$19.1m
Hunting tours and guide fees	\$3.8m	\$0.4m	\$0.0m	\$0.0m	\$0.3m	\$1.2m	\$0.0m	\$5.9m
Other	\$2.1m	\$0.6m	\$0.1m	\$3.3m	\$1.8m	\$1.2m	\$0.0m	\$9.0m
Total	\$184.6m	\$30.2m	\$2.4m	\$51.2m	\$26.8m	\$15.5m	\$3.3m	\$314.0m

1	Executive summary
2	Introduction
3	Key market insights
4	Approach to the study
5	Economic contribution
6	Social benefits
7	Volunteerism
8	Appendices
A	Trip expenditure
B	Non-trip expenditure
C	Region analysis
D	LGA analysis
E	Town analysis
F	Comparative analysis
G	Survey questionnaire
H	Limitations of the analysis
I	Changes in study scope
J	Potential future survey improvements

Appendix B - Non-trip expenditure by game species

In 2025, Victorian game licence holders spent an estimated \$248.2 million on non-trip purchases, representing a 78% nominal and 40% real increase since 2019.

Item	Game species ¹			Total
	Deer	Duck	Quail	
Firearms, bows and other firearm equipment	\$60.1m	\$12.7m	\$1.9m	\$74.8m
Other equipment (e.g. vehicle equipment and accessories, safety equipment, camping equipment, clothing, knives and binoculars)*	\$36.8m	\$7.6m	\$1.0m	\$45.5m
Vehicles, motorbikes and boats (purchased with hunting in mind)*	\$32.8m	\$7.9m	\$1.3m	\$42.0m
Ammunition	\$18.6m	\$5.4m	\$0.9m	\$25.0m
Vehicle, motorbike and boat maintenance*	\$18.3m	\$4.6m	\$0.7m	\$23.6m
Other items (excluding game licence fees)*	\$11.0m	\$2.2m	\$0.5m	\$13.7m
Training (e.g. target practice)	\$7.2m	\$2.9m	\$0.5m	\$10.6m
Hunting club memberships	\$5.5m	\$1.8m	\$0.2m	\$7.5m
Firearm and crossbow licence fees (excluding game licence fees)	\$4.3m	\$1.1m	\$0.2m	\$5.6m
Total	\$194.7m	\$46.3m	\$7.1m	\$248.2m

¹ Non-trip expenditure is attributed to game species only, not pest animals. While pest species may be the primary target of some recreational hunting trips, Victorian game licence holders are licensed to hunt game species and non-trip expenditure is therefore attributed to game species only.

* Note: only includes the proportion attributable to recreational hunting activity.

1	Executive summary
2	Introduction
3	Key market insights
4	Approach to the study
5	Economic contribution
6	Social benefits
7	Volunteerism
8	Appendices
A	Trip expenditure
B	Non-trip expenditure
C	Region analysis
D	LGA analysis
E	Town analysis
F	Comparative analysis
G	Survey questionnaire
H	Limitations of the analysis
I	Changes in study scope
J	Potential future survey improvements

Appendix C - Economic contribution by region

Regional Victoria accounted for over 70% of economic contribution, led by Gippsland (15%) and Ovens Murray (11%). This reflects the fact that around 70% of trip expenditure and 60% of non-trip expenditure occurred in regional Victoria.

Region	Direct expenditure			Gross State Product ¹			Employment (FTE) ¹		
	Trip	Non-trip	Total	Direct	Indirect	Total	Direct	Indirect	Total
Greater Melbourne	\$91.6m	\$100.7m	\$192.2m	\$70.6m	\$86.8m	\$157.4m	589	488	1,077
Gippsland	\$89.8m	\$48.2m	\$138.1m	\$49.3m	\$32.4m	\$81.7m	397	186	584
Ovens Murray	\$62.6m	\$39.2m	\$101.8m	\$36.4m	\$23.4m	\$59.9m	295	152	447
Barwon	\$19.6m	\$13.8m	\$33.4m	\$12.1m	\$9.3m	\$21.4m	102	57	159
Goulburn	\$14.6m	\$15.5m	\$30.1m	\$10.7m	\$9.6m	\$20.3m	88	55	143
Loddon Campaspe	\$16.2m	\$13.6m	\$29.7m	\$10.3m	\$8.1m	\$18.4m	85	49	133
Central Highlands	\$10.3m	\$9.2m	\$19.5m	\$6.8m	\$5.1m	\$12.0m	55	32	88
Great South Coast	\$4.9m	\$3.4m	\$8.2m	\$3.0m	\$2.2m	\$5.1m	26	14	40
Mallee	\$2.3m	\$3.0m	\$5.3m	\$1.9m	\$1.6m	\$3.4m	15	9	25
Wimmera Southern Mallee	\$2.1m	\$1.7m	\$3.8m	\$1.3m	\$0.9m	\$2.2m	11	6	17
Inter-regional trade ²	-	-	-	-	\$177.2m	\$177.2m	-	990	990
Total	\$314.0m	\$248.2m	\$562.2m	\$202.4m	\$356.5m	\$559.0m	1,665	2,039	3,703

¹ Estimated using BDO’s in-house RISE input-output model.

² Indirect GSP and FTE attributed to inter-regional trade accounts for trade between regions where direct spending in one region generates indirect spending in other regions.

Appendix D - Economic contribution by LGA

The top 20 regional LGAs were concentrated in Gippsland, Ovens Murray, Barwon, Goulburn and Central Highlands. Wellington was the largest LGA contributor, followed by Mansfield, Baw Baw, East Gippsland and Wodonga.

LGA (Region)	Direct expenditure			Gross State Product ¹			Employment (FTE) ¹		
	Trip	Non-trip	Total	Direct	Indirect	Total	Direct	Indirect	Total
Greater Melbourne	\$91.6m	\$100.7m	\$192.2m	\$70.6m	\$86.8m	\$157.4m	589	488	1,077
Wellington (Gippsland)	\$32.1m	\$8.2m	\$40.3m	\$14.4m	\$5.7m	\$20.1m	125	29	154
Mansfield (Ovens Murray)	\$19.3m	\$17.0m	\$36.3m	\$12.8m	\$3.9m	\$16.7m	101	31	132
Baw Baw (Gippsland)	\$18.8m	\$14.1m	\$32.9m	\$11.6m	\$4.9m	\$16.5m	94	35	129
East Gippsland (Gippsland)	\$21.7m	\$10.9m	\$32.6m	\$11.9m	\$4.0m	\$15.9m	91	28	119
Wodonga (Ovens Murray)	\$14.2m	\$12.1m	\$26.3m	\$9.4m	\$3.1m	\$12.6m	72	22	94
Latrobe (Gippsland)	\$13.5m	\$12.8m	\$26.4m	\$9.2m	\$2.6m	\$11.9m	68	17	85
Greater Geelong (Barwon)	\$12.2m	\$10.3m	\$22.5m	\$7.8m	\$3.5m	\$11.2m	65	23	87
Greater Bendigo (Loddon Campaspe)	\$5.5m	\$12.5m	\$17.9m	\$6.2m	\$3.0m	\$9.3m	50	15	66
Wangaratta (Ovens Murray)	\$8.8m	\$6.7m	\$15.5m	\$5.4m	\$2.3m	\$7.7m	47	18	64
Ballarat (Central Highlands)	\$6.1m	\$7.4m	\$13.5m	\$4.7m	\$1.7m	\$6.4m	37	12	50
Murrindindi (Goulburn)	\$10.1m	\$2.3m	\$12.3m	\$4.8m	\$1.1m	\$5.9m	54	12	66
Benalla (Ovens Murray)	\$8.2m	\$1.8m	\$9.9m	\$3.6m	\$1.0m	\$4.6m	35	7	42
Mitchell (Goulburn)	\$3.8m	\$4.7m	\$8.5m	\$3.1m	\$0.9m	\$4.0m	28	7	34
Colac Otway (Barwon)	\$3.3m	\$3.2m	\$6.5m	\$2.3m	\$0.7m	\$3.0m	19	5	24
Alpine (Ovens Murray)	\$5.7m	\$0.7m	\$6.4m	\$2.4m	\$0.6m	\$3.0m	19	5	24
Greater Shepparton (Goulburn)	\$1.7m	\$4.0m	\$5.7m	\$1.9m	\$0.7m	\$2.6m	15	4	20
Towong (Ovens Murray)	\$4.2m	\$0.7m	\$4.9m	\$1.9m	\$0.5m	\$2.4m	21	4	25
Loddon (Loddon Campaspe)	\$3.8m	\$1.0m	\$4.8m	\$1.9m	\$0.5m	\$2.4m	21	4	25
South Gippsland (Gippsland)	\$2.6m	\$0.7m	\$3.3m	\$1.3m	\$0.5m	\$1.8m	12	3	16
Moira (Goulburn)	\$1.2m	\$2.4m	\$3.6m	\$1.3m	\$0.4m	\$1.7m	10	3	13
Other	\$25.8m	\$13.9m	\$39.7m	\$13.9m	\$228.0m	\$241.9m	91	1,267	1,358
Total	\$314.0m	\$248.2m	\$562.2m	\$202.4m	\$356.5m	\$559.0m	1,665	2,039	3,703

¹ Estimated using BDO's in-house RISE input-output model.

Appendix E - Expenditure by town

The top 40 highest spending regional towns were distributed across 8 of the 9 regions. Gippsland had the highest representation (13), followed by Ovens Murray (8), Goulburn (6), Barwon (5), Central Highlands (3), Loddon Campaspe (2), Great South Coast (2) and Wimmera Southern Mallee (1).

Town (Region)	Game species			Pest species				Total
	Deer	Duck	Quail	Foxes	Rabbits	Pigs	Goats	
Greater Melbourne	\$140.1m	\$20.4m	\$3.5m	\$14.9m	\$7.8m	\$4.5m	\$1.0m	\$192.2m
Mansfield (Ovens Murray)	\$27.8m	\$1.8m	\$0.2m	\$3.5m	\$1.8m	\$1.0m	\$0.2m	\$36.3m
Wodonga (Ovens Murray)	\$16.4m	\$2.3m	\$0.2m	\$2.3m	\$1.2m	\$0.7m	\$0.1m	\$23.2m
Bairnsdale (Gippsland)	\$13.3m	\$3.3m	\$0.4m	\$2.5m	\$1.3m	\$0.7m	\$0.2m	\$21.8m
Sale (Gippsland)	\$10.2m	\$5.3m	\$0.1m	\$2.9m	\$1.5m	\$0.9m	\$0.2m	\$21.2m
Warragul (Gippsland)	\$13.8m	\$3.1m	\$0.2m	\$1.5m	\$0.8m	\$0.5m	\$0.1m	\$19.9m
Morwell (Gippsland)	\$10.2m	\$2.9m	\$0.2m	\$1.3m	\$0.7m	\$0.4m	\$0.1m	\$15.7m
Bendigo (Loddon Campaspe)	\$9.8m	\$3.7m	\$0.7m	\$0.6m	\$0.3m	\$0.2m	\$0.0m	\$15.2m
Wangaratta (Ovens Murray)	\$8.3m	\$1.4m	\$0.3m	\$1.5m	\$0.8m	\$0.5m	\$0.1m	\$12.8m
Traralgon (Gippsland)	\$5.2m	\$1.7m	\$0.0m	\$1.3m	\$0.7m	\$0.4m	\$0.1m	\$9.4m
Geelong (Barwon)	\$7.5m	\$1.1m	\$0.2m	\$0.2m	\$0.1m	\$0.1m	\$0.0m	\$9.1m
Moe (Gippsland)	\$4.0m	\$0.3m	\$0.0m	\$1.1m	\$0.6m	\$0.3m	\$0.1m	\$6.5m
Benalla (Ovens Murray)	\$4.3m	\$0.1m	\$0.0m	\$1.0m	\$0.5m	\$0.3m	\$0.1m	\$6.2m
Ballarat Central (Central Highlands)	\$3.7m	\$1.4m	\$0.4m	\$0.3m	\$0.1m	\$0.1m	\$0.0m	\$6.1m
Colac (Barwon)	\$2.9m	\$1.7m	\$0.1m	\$0.5m	\$0.3m	\$0.2m	\$0.0m	\$5.6m
Leopold (Barwon)	\$3.4m	\$0.1m	\$0.0m	\$1.1m	\$0.6m	\$0.3m	\$0.1m	\$5.6m
Maffra (Gippsland)	\$3.5m	\$0.2m	\$0.0m	\$1.0m	\$0.5m	\$0.3m	\$0.1m	\$5.5m
Shepparton (Gippsland)	\$2.5m	\$1.6m	\$0.4m	\$0.2m	\$0.1m	\$0.1m	\$0.0m	\$5.0m
Stratford (Gippsland)	\$2.1m	\$0.6m	\$0.0m	\$0.9m	\$0.5m	\$0.3m	\$0.1m	\$4.4m
Kilmore (Goulburn)	\$3.2m	\$0.6m	\$0.0m	\$0.2m	\$0.1m	\$0.1m	\$0.0m	\$4.2m
Seymour (Goulburn)	\$3.2m	\$0.2m	\$0.1m	\$0.3m	\$0.2m	\$0.1m	\$0.0m	\$4.0m

Appendix E - Expenditure by town

The top 40 highest spending regional towns were distributed across 8 of the 9 regions. Gippsland had the highest representation (13), followed by Ovens Murray (8), Goulburn (6), Barwon (5), Central Highlands (3), Loddon Campaspe (2), Great South Coast (2) and Wimmera Southern Mallee (1).

Town (Region)	Game species			Pest species				Total
	Deer	Duck	Quail	Foxes	Rabbits	Pigs	Goats	
Ascot (Loddon Campaspe)	\$3.0m	\$0.1m	\$0.0m	\$0.4m	\$0.2m	\$0.1m	\$0.0m	\$3.9m
Myrtleford (Ovens Murray)	\$2.3m	\$0.0m	\$0.0m	\$0.6m	\$0.3m	\$0.2m	\$0.0m	\$3.5m
Alexandra (Goulburn)	\$2.1m	\$0.3m	\$0.0m	\$0.6m	\$0.3m	\$0.2m	\$0.0m	\$3.5m
Omeo (Gippsland)	\$2.0m	\$0.0m	\$0.0m	\$0.6m	\$0.3m	\$0.2m	\$0.0m	\$3.1m
Ballarat (Central Highlands)	\$2.1m	\$0.4m	\$0.1m	\$0.2m	\$0.1m	\$0.1m	\$0.0m	\$3.0m
Warrnambool (Great South Coast)	\$1.8m	\$0.3m	\$0.0m	\$0.5m	\$0.2m	\$0.1m	\$0.0m	\$3.0m
Horsham (Wimmera Southern Mallee)	\$1.1m	\$1.0m	\$0.3m	\$0.3m	\$0.2m	\$0.1m	\$0.0m	\$2.9m
Hamilton (Great South Coast)	\$2.2m	\$0.1m	\$0.0m	\$0.2m	\$0.1m	\$0.1m	\$0.0m	\$2.6m
Beechworth (Ovens Murray)	\$1.6m	\$0.0m	\$0.0m	\$0.5m	\$0.2m	\$0.1m	\$0.0m	\$2.5m
Jamieson (Ovens Murray)	\$1.5m	\$0.0m	\$0.0m	\$0.5m	\$0.2m	\$0.1m	\$0.0m	\$2.4m
Tungamah (Goulburn)	\$1.8m	\$0.3m	\$0.0m	\$0.1m	\$0.1m	\$0.0m	\$0.0m	\$2.3m
Yea (Goulburn)	\$1.1m	\$0.3m	\$0.0m	\$0.4m	\$0.2m	\$0.1m	\$0.0m	\$2.2m
Hillside (Gippsland)	\$1.1m	\$0.0m	\$0.2m	\$0.4m	\$0.2m	\$0.1m	\$0.0m	\$2.1m
Licola (Gippsland)	\$1.2m	\$0.0m	\$0.0m	\$0.4m	\$0.2m	\$0.1m	\$0.0m	\$2.0m
Clifton Springs (Barwon)	\$0.1m	\$1.1m	\$0.0m	\$0.4m	\$0.2m	\$0.1m	\$0.0m	\$2.0m
Eildon (Goulburn)	\$1.2m	\$0.0m	\$0.0m	\$0.4m	\$0.2m	\$0.1m	\$0.0m	\$1.9m
Corryong (Ovens Murray)	\$1.2m	\$0.0m	\$0.0m	\$0.3m	\$0.2m	\$0.1m	\$0.0m	\$1.8m
Rosedale (Gippsland)	\$0.3m	\$0.8m	\$0.0m	\$0.4m	\$0.2m	\$0.1m	\$0.0m	\$1.8m
Bell Park (Barwon)	\$1.0m	\$0.1m	\$0.0m	\$0.4m	\$0.2m	\$0.1m	\$0.0m	\$1.8m
Dereel (Central Highlands)	\$1.1m	\$0.0m	\$0.0m	\$0.4m	\$0.2m	\$0.1m	\$0.0m	\$1.8m
Other	\$54.2m	\$17.9m	\$1.7m	\$4.3m	\$2.2m	\$1.3m	\$0.3m	\$310.5m
Total Victoria	\$379.4m	\$76.5m	\$9.5m	\$51.2m	\$26.8m	\$15.5m	\$3.3m	\$562.2m

1	Executive summary
2	Introduction
3	Key market insights
4	Approach to the study
5	Economic contribution
6	Social benefits
7	Volunteerism
8	Appendices
A	Trip expenditure
B	Non-trip expenditure
C	Region analysis
D	LGA analysis
E	Town analysis
F	Comparative analysis
G	Survey questionnaire
H	Limitations of the analysis
I	Changes in study scope
J	Potential future survey improvements

Appendix F - Comparative analysis: Trip expenditure

Trip expenditure increased from \$211.6 million in 2019 to \$314.0 million in 2025, representing a 48% nominal increase and 17% real increase. The largest increases were in fuel, ammunition and groceries.

Item	2025	2019 (\$2019)	2019 (\$2025) ¹	Nominal increase (\$)	Nominal increase (%)	Real increase (\$)	Real increase (%)
Fuel	\$86.7m	\$48.9m	\$62.2m	\$37.8m	77%	\$24.6m	40%
Groceries	\$53.9m	\$36.7m	\$46.7m	\$17.2m	47%	\$7.3m	16%
Hunting equipment	\$41.0m	\$36.5m	\$46.4m	\$4.5m	12%	-\$5.4m	-12%
Vehicle repairs	\$29.2m	\$16.5m	\$21.0m	\$12.7m	77%	\$8.2m	39%
Ammunition	\$38.4m	\$19.8m	\$25.2m	\$18.6m	94%	\$13.2m	52%
Takeaway and restaurant meals	\$30.8m	\$15.9m	\$20.2m	\$14.9m	94%	\$10.6m	52%
Accommodation	\$19.1m	\$10.9m	\$13.9m	\$8.2m	75%	\$5.2m	38%
Hunting tours and guide fees	\$5.9m	\$2.2m	\$2.8m	\$3.7m	167%	\$3.1m	110%
Other	\$9.0m	\$24.2m	\$30.8m	-\$15.2m	-63%	-\$21.8m	-71%
Total	\$314.0m	\$211.6m	\$269.1m	\$102.4m	48%	\$44.9m	17%

¹ Estimated using ABS All groups CPI for Australia. Australian Bureau of Statistics. *Consumer Price Index, Australia*. Available [here](#). Note: CPI reflects a standard household basket of goods. Hunting related items may have experienced different inflation over the period.

1	Executive summary
2	Introduction
3	Key market insights
4	Approach to the study
5	Economic contribution
6	Social benefits
7	Volunteerism
8	Appendices
A	Trip expenditure
B	Non-trip expenditure
C	Region analysis
D	LGA analysis
E	Town analysis
F	Comparative analysis
G	Survey questionnaire
H	Limitations of the analysis
I	Changes in study scope
J	Potential future survey improvements

Appendix F - Comparative analysis: Non-trip expenditure

Non-trip expenditure increased from \$139.4 million in 2019 to \$248.2 million in 2025, representing a 78% nominal increase and 40% real increase. The largest increases were in firearms equipment, other hunting equipment and vehicles.

Item	2025	2019 (\$2019)	2019 (\$2025) ¹	Nominal increase (\$)	Nominal increase (%)	Real increase (\$)	Real increase (%)
Firearms, bows and other firearm equipment	\$74.8m	\$45.3m	\$57.6m	\$29.5m	65%	\$17.2m	30%
Other equipment (e.g. vehicle equipment and accessories, safety equipment, camping equipment, clothing, knives and binoculars)*	\$45.5m	\$21.0m	\$26.7m	\$24.5m	117%	\$18.8m	70%
Vehicles, motorbikes and boats (purchased with hunting in mind)*	\$42.0m	\$24.7m	\$31.4m	\$17.3m	70%	\$10.6m	34%
Ammunition	\$25.0m	\$13.2m	\$16.8m	\$11.8m	89%	\$8.2m	49%
Vehicle, motorbike and boat maintenance*	\$23.6m	\$13.4m	\$17.0m	\$10.2m	76%	\$6.6m	39%
Other items (excluding game licence fees)*	\$13.7m	\$6.2m	\$7.9m	\$7.5m	120%	\$5.8m	73%
Training (e.g. target practice)	\$10.6m	\$5.2m	\$6.6m	\$5.4m	104%	\$4.0m	60%
Hunting club memberships	\$7.5m	\$3.9m	\$5.0m	\$3.6m	92%	\$2.5m	51%
Firearm and crossbow licence fees (excluding game licence fees)	\$5.6m	\$6.5m	\$8.3m	-\$0.9m	-14%	-\$2.6m	-32%
Total	\$248.2m	\$139.4m	\$177.3m	\$108.8m	78%	\$70.9m	40%

¹ Estimated using ABS All groups CPI for Australia. Australian Bureau of Statistics. *Consumer Price Index, Australia*. Available [here](#). Note: CPI reflects a standard household basket of goods. Hunting related items may have experienced different inflation over the period.

* Note: only includes the proportion attributable to recreational hunting activity.

1	Executive summary
2	Introduction
3	Key market insights
4	Approach to the study
5	Economic contribution
6	Social benefits
7	Volunteerism
8	Appendices
A	Trip expenditure
B	Non-trip expenditure
C	Region analysis
D	LGA analysis
E	Town analysis
F	Comparative analysis
G	Survey questionnaire
H	Limitations of the analysis
I	Changes in study scope
J	Potential future survey improvements

Appendix F - Comparative analysis: GSP by species

GSP increased from \$356.1 million in 2019 to \$559.0 million in 2025, representing a 57% nominal increase and 24% real increase. Deer accounts for two-thirds of this contribution, up from 56% in 2019. Pest (17%), duck (14%) and quail (2%) account for smaller shares, down from 19%, 18% and 6%.

Region	Gross State Product (2025 results) ¹			Gross State Product (2019 results in 2019 dollars) ¹			Gross State Product (2019 results in 2025 dollars) ^{1,2}		
	Direct	Indirect	Total	Direct	Indirect	Total	Direct	Indirect	Total
Deer	\$136.3m	\$241.0m	\$377.3m	\$90.3m	\$110.2m	\$200.5m	\$114.8m	\$140.1m	\$255.0m
Duck	\$27.4m	\$49.4m	\$76.7m	\$28.5m	\$36.2m	\$64.7m	\$36.2m	\$46.0m	\$82.3m
Quail	\$3.4m	\$6.3m	\$9.7m	\$9.5m	\$12.3m	\$21.9m	\$12.1m	\$15.6m	\$27.8m
Fox*	\$18.7m	\$31.7m	\$50.4m	\$37.5m	\$37.5m	\$69.0m	\$40.1m	\$47.7m	\$87.8m
Rabbit*	\$9.8m	\$16.6m	\$26.4m						
Pig*	\$5.6m	\$9.6m	\$15.3m						
Goat*	\$1.2m	\$2.0m	\$3.2m						
Total	\$202.4m	\$356.5m	\$559.0m	\$159.8m	\$196.3m	\$356.1m	\$203.2m	\$249.6m	\$452.8m

¹ Estimated using BDO’s in-house RISE input-output model.

² Estimated using ABS All groups CPI for Australia. Australian Bureau of Statistics. *Consumer Price Index, Australia*. Available [here](#). Note: CPI reflects a standard household basket of goods. Hunting related items may have experienced different inflation over the period.

* Note: the 2025 study disaggregates pest species, whereas the 2019 study aggregated all pest species.

1	Executive summary
2	Introduction
3	Key market insights
4	Approach to the study
5	Economic contribution
6	Social benefits
7	Volunteerism
8	Appendices
A	Trip expenditure
B	Non-trip expenditure
C	Region analysis
D	LGA analysis
E	Town analysis
F	Comparative analysis
G	Survey questionnaire
H	Limitations of the analysis
I	Changes in study scope
J	Potential future survey improvements

Appendix F - Comparative analysis: GSP by region

Gippsland and Ovens Murray experienced the largest increases in GSP of \$38.6 million and \$30.0 million, respectively. Smaller but still meaningful increases were observed in Barwon (\$9.4 million), Central Highlands (\$6.1 million) and Loddon Campaspe (\$2.7 million).

Region	Gross State Product (2025 results) ¹			Gross State Product (2019 results in 2019 dollars) ¹			Gross State Product (2019 results in 2025 dollars) ^{1,2}		
	Direct	Indirect	Total	Direct	Indirect	Total	Direct	Indirect	Total
Greater Melbourne	\$70.6m	\$86.8m	\$157.4m	\$40.5m	\$46.3m	\$86.8m	\$51.5m	\$58.9m	\$110.4m
Gippsland	\$49.3m	\$32.4m	\$81.7m	\$26.1m	\$17.0m	\$43.1m	\$33.2m	\$21.6m	\$54.8m
Ovens Murray	\$36.4m	\$23.4m	\$59.9m	\$16.7m	\$13.2m	\$29.9m	\$21.2m	\$16.8m	\$38.0m
Barwon	\$12.1m	\$9.3m	\$21.4m	\$6.9m	\$5.1m	\$12.0m	\$8.8m	\$6.5m	\$15.3m
Goulburn	\$10.7m	\$9.6m	\$20.3m	\$11.6m	\$6.4m	\$17.9m	\$14.8m	\$8.1m	\$22.8m
Loddon Campaspe	\$10.3m	\$8.1m	\$18.4m	\$8.8m	\$6.9m	\$15.7m	\$11.2m	\$8.8m	\$20.0m
Central Highlands	\$6.8m	\$5.1m	\$12.0m	\$3.5m	\$2.4m	\$5.9m	\$4.5m	\$3.1m	\$7.5m
Great South Coast	\$3.0m	\$2.2m	\$5.1m	\$1.9m	\$1.2m	\$3.1m	\$2.4m	\$1.5m	\$3.9m
Mallee	\$1.9m	\$1.6m	\$3.4m	\$5.2m	\$3.6m	\$8.8m	\$6.6m	\$4.6m	\$11.2m
Wimmera Southern Mallee	\$1.3m	\$0.9m	\$2.2m	\$5.6m	\$3.7m	\$9.3m	\$7.1m	\$4.7m	\$11.8m
<i>Inter-regional trade¹</i>	-	<i>\$177.2m</i>	<i>\$177.2m</i>	-	<i>\$123.5m</i>	<i>\$123.5m</i>	-	<i>\$157.1m</i>	<i>\$157.1m</i>
Total	\$202.4m	\$356.5m	\$559.0m	\$126.8m	\$229.3m	\$356.1m	\$161.3m	\$291.6m	\$452.9m

¹ Estimated using BDO’s in-house RISE input-output model. Indirect GSP attributed to inter-regional trade accounts for trade between regions where direct spending in one region generates indirect spending in other regions.

² Estimated using ABS All groups CPI for Australia. Australian Bureau of Statistics. *Consumer Price Index, Australia*. Available [here](#). Note: CPI reflects a standard household basket of goods. Hunting related items may have experienced different inflation over the period.

1	Executive summary
2	Introduction
3	Key market insights
4	Approach to the study
5	Economic contribution
6	Social benefits
7	Volunteerism
8	Appendices
A	Trip expenditure
B	Non-trip expenditure
C	Region analysis
D	LGA analysis
E	Town analysis
F	Comparative analysis
G	Survey questionnaire
H	Limitations of the analysis
I	Changes in study scope
J	Potential future survey improvements

Appendix G - Survey questionnaire

The survey collected information on participants’ gender, age group, state or territory of residence, hunting licences and association memberships.

Preliminary questions		Hunting activity	
Are you...	Which state or territory do you currently live in?	Have you hunted recreationally in Victoria in the past 12 months?	Are you a member of a hunting association?
- Male - Female - Other - Do not wish to answer	- New South Wales - Queensland - Victoria - South Australia - Tasmania - Western Australia - Northern Territory - Australian Capital Territory - Outside Australia	- Yes - No	- Yes - No - Unsure
Which age range do you fall into?		Do you plan to go recreational hunting in Victoria in the next 12 months?	
- Under 18 18-24 25-29 30-34 35-39 40-44 45-49 50-54 55-59 60-64 65-74 75 and over - Do not wish to answer		- Yes - No	
	Where do you live in Victoria?	Which animals and hunting methods are you licensed to hunt in Victoria?	
	- Postcode: _____ - Town/suburb: _____	Please select all that apply - Deer stalking with firearm - Deer stalking with bow - Deer (Hounds) - Duck - Stubble quail - Game birds at a licence game bird farm - Unsure - None of these	

Appendix G - Survey questionnaire

The survey collected information on participants’ recent hunting activity in Victoria, including trip frequency, target species, locations visited and expenditure during their most recent hunting trip.

Hunting trips in Victoria in the past 12 months		Most recent hunting trip in Victoria	
Approximately how many recreational hunting trips have you been on in the last 12 months in Victoria? <i>Please count both overnight and day trips. Do not include times you have hunted on your own property or your neighbours for pest control reasons.</i> - Trips: _____ In the past 12 months, on your hunting trips in Victoria, how many trips did you mainly hunt each of the following animals? <i>Choose the main animal you planned to hunt on those trips, irrespective of what you bagged.</i> - Deer: _____ - Duck: _____ - Stubble quail: _____ - game birds at a game bird farm: _____ - Pest animals (e.g. rabbits, foxes, pigs, goats): _____	Thinking about all the times when you hunted these animals recreationally in Victoria in the last 12 months, which were the nearest town/s where the animals were hunted? <i>Please indicate the most frequent town under “Town 1”, second most frequent under “Town 2”, etc.</i> <i>NB i.) If you hunted on private land or in the bush, please name the closest town to where you were hunting.</i> <i>NB ii.) You only need to name each town you have hunted in once. If you only hunted in one town but across multiple trips just enter the town under “Town 1”.</i> - Deer: _____ - Duck: _____ - Stubble quail: _____ - game birds at a game bird farm: _____ - Pest animals (e.g. rabbits, foxes, pigs, goats): _____	Which of the following animals did you hunt during your most recent recreational hunting trip in Victoria? <i>Please only consider the animal you hunted the most.</i> - Deer - Duck - Stubble quail - game birds - Pest animals (e.g. rabbits, foxes, pigs, goats, etc.) Where did you mainly hunt on that trip? <i>Please name the closest town to where you were hunting.</i> - Town: _____	During this hunting trip in Victoria, what did you spend money on? <i>Please include anything you paid for, whether by cash, EFTPOS, cheque, credit card, etc. If you paid for other people include that amount. If someone else paid for you, then exclude that amount.</i> - Fuel - Groceries (including food, drinks, alcohol and dog food) for self-catering or consumption at your accommodation - Ammunition - Food and drinks bought at cafes and restaurants - Hunting equipment (e.g. decoys, clothing) - Accommodation - Vehicle/motorbike/boat repairs - Hunting tours/package tour, hunting guide fees - Other items needed for your hunting trip - Not applicable - I did not spend any money on this trip

Appendix G - Survey questionnaire

The survey collected information on participants’ trip and non-trip expenditure, including purchase locations and the proportion of non-trip expenditure attributable to hunting activities.

Trip expenditure		Non-trip expenditure	
1 Executive summary 2 Introduction 3 Key market insights 4 Approach to the study 5 Economic contribution 6 Social benefits 7 Volunteerism 8 Appendices A Trip expenditure B Non-trip expenditure C Region analysis D LGA analysis E Town analysis F Comparative analysis G Survey questionnaire H Limitations of the analysis I Changes in study scope J Potential future survey improvements	Approximately how much did you spend on these items? <i>Please include anything you paid for, whether by cash, EFTPOS, cheque, credit card or any other means.</i> <i>Please include any money you paid for other people if you were not reimbursed (e.g. if paid for someone else’s meal).</i> <i>Please exclude any money paid on your behalf by someone else who travelled with you on the hunting trip.</i> • \$1-20 • \$21-50 • \$51-100 • \$101-200 • \$201-500 • \$501 or more	What was the location of the business/es from which you bought these items? <i>If you bought items from more than one location, please select the location where the most money was spent.</i> • Home • At the destination • Another town in Victoria • Interstate/overseas • Online • Unsure/can’t recall Which Victorian town/s did you buy these item/s from? • Town: _____ From which online retailer did you buy these item/s from? • Online retailer: _____	During the last 12 months, which of the items from the following list have you spent money on to support your recreational hunting activities? • Firearms, bows and other firearm equipment • Ammunition • Hunting club memberships • Firearm licence fees (excluding game licence fees) • Training to support your hunting activities (e.g. target practice) • Vehicles/motorbikes/boats (purchased with hunting in mind) • Vehicle/motorbike/boat maintenance • Other equipment to support your hunting activities (e.g. vehicle equipment/accessories, safety equipment, camping equipment, clothing, knives, binoculars, etc.) • Other items to support your hunting activities (excluding game licence fees) • Not applicable - I did not spend any money to support hunting activities in the past 12 months During the past 12 months, approximately how much have you spent on these items? • \$1-100 • \$101-500 • \$501-1,000 • \$1,001-2,000 • \$2,001-5,000 • \$5,001-\$10,000 • \$10,000 or more Approximately what percentage of the use of these items has been on recreational hunting activities versus non hunting activities? • None • 1-25% • 26-50% • 51-75% • 76-99% • 100%

1	Executive summary
2	Introduction
3	Key market insights
4	Approach to the study
5	Economic contribution
6	Social benefits
7	Volunteerism
8	Appendices
A	Trip expenditure
B	Non-trip expenditure
C	Region analysis
D	LGA analysis
E	Town analysis
F	Comparative analysis
G	Survey questionnaire
H	Limitations of the analysis
I	Changes in study scope
J	Potential future survey improvements

Appendix G - Survey questionnaire

The survey collected information on the main location of non-trip purchases as well as motivations for recreational hunting.

Non-trip expenditure	Motivations
What is the main location of the business/es from which you usually buy these items? <i>If you bought these items at more than one location, please select the location where the most money was spent.</i> <i>For online purchases please record your answer against the location where the vendor is located.</i> - Melbourne - In a Victorian town or city other than Melbourne - Interstate - Overseas - Online - Unsure/can't recall At which Victorian town or city do you usually buy these items? - Town: _____ From which online retailer do you usually buy these item/s from? - Online retailer: _____	What are the top 5 reasons you like to go recreational hunting? <i>If the most important reason/s you hunt aren't given, please type them in the space provided.</i> - To relax and unwind - To spend time in the outdoors - To spend time with family - To spend time with friends - To meet new people - To get away from my day-to-day life - To continue a family or cultural tradition of hunting - To get away from other people - Because I enjoy hunting - Because it is challenging - Because it is exciting - To get food for myself or my friends/family - To get exercise - To spend time in places that are special to me - To reduce pest species populations - Other (please describe)

1	Executive summary
2	Introduction
3	Key market insights
4	Approach to the study
5	Economic contribution
6	Social benefits
7	Volunteerism
8	Appendices
A	Trip expenditure
B	Non-trip expenditure
C	Region analysis
D	LGA analysis
E	Town analysis
F	Comparative analysis
G	Survey questionnaire
H	Limitations of the analysis
I	Changes in study scope
J	Potential future survey improvements

Appendix G - Survey questionnaire

The survey collected information on other outdoor recreational activities participants undertake.

Other outdoor recreational activities
Which of the following hobbies or sporting activities do you also participate in (some may be things you do at the same time as hunting)? <i>Please select all that apply.</i> • Bushwalking or hiking • Outdoor photography • Bird or animal watching • Fishing • Mountain biking • Four-wheel driving • Horse riding • Camping • None of the above

1	Executive summary
2	Introduction
3	Key market insights
4	Approach to the study
5	Economic contribution
6	Social benefits
7	Volunteerism
8	Appendices
A	Trip expenditure
B	Non-trip expenditure
C	Region analysis
D	LGA analysis
E	Town analysis
F	Comparative analysis
G	Survey questionnaire
H	Limitations of the analysis
I	Changes in study scope
J	Potential future survey improvements

Appendix G - Survey questionnaire

The survey collected information on participants’ self-rated general health, overall life satisfaction and perceptions of their broader community.

Self-rated general health and overall life satisfaction	Perceptions of the broader community
How would you rate your general health? • Excellent • Very good • Good • Fair • Poor Thinking about your own life and personal circumstances, how satisfied are you with the following? <i>Please indicate how satisfied or dissatisfied you are with each of the following (where 0 = completely dissatisfied and 10 = completely satisfied).</i> • Your life as a whole • Your standard of living • Your health • What you are currently achieving in life • Your personal relationships • How safe you feel • Feeling part of your community • Your future security	What is your broader community like? (answer in general if you interact with multiple communities)? <i>Please indicate how much you agree or disagree with each statement (where 1 = strongly disagree and 7 = strongly agree).</i> <i>Additional explanation if unclear: We all have ‘communities’ - groups of people we spend time with, who might live in the same place as us, or live in different places but have common interests. These questions relate to your connection with society around you, not just that relating to hunting only.</i> • I feel welcome in my social group/s • I feel part of my community • I belong in my community • I feel like an outsider in my community • My community is a great place to live • My community copes well when faced with challenges • I feel proud to live in this community • My community has a bright future • There’s good community spirit around here

1	Executive summary
2	Introduction
3	Key market insights
4	Approach to the study
5	Economic contribution
6	Social benefits
7	Volunteerism
8	Appendices
A	Trip expenditure
B	Non-trip expenditure
C	Region analysis
D	LGA analysis
E	Town analysis
F	Comparative analysis
G	Survey questionnaire
H	Limitations of the analysis
I	Changes in study scope
J	Potential future survey improvements

Appendix G - Survey questionnaire

The survey collected information on participants’ volunteering activity in the previous 12 months.

Volunteering for outdoor activities	
Which of the following activities do you volunteer for that help care for the natural environment, such as supporting game species, contributing to conservation, or improving outdoor recreation? • Habitat restoration (e.g. making/installing nesting boxes for ducks, tree planting, weed control, etc) • 4WD track maintenance to support • Hiking track maintenance to support • Litter/rubbish clearing from public spaces • Pest control activities, such as fox control, in native bushland, forests, wetlands, etc • Other (please describe) Was this activity on? • Public land (e.g. state game reserve or state forest) • Private land • Both public and private land • Unsure	Which groups did you volunteer with? • Local environment groups (e.g. Landcare) • Hunting organisation • State Government (e.g. Parks Victoria, DEECA) • Other (please describe) Approximately how many hours did you spend volunteering in the last 12 months on these activities? • Hours spent: _____

1	Executive summary
2	Introduction
3	Key market insights
4	Approach to the study
5	Economic contribution
6	Social benefits
7	Volunteerism
8	Appendices
A	Trip expenditure
B	Non-trip expenditure
C	Region analysis
D	LGA analysis
E	Town analysis
F	Comparative analysis
G	Survey questionnaire
H	Limitations of the analysis
I	Changes in study scope
J	Potential future survey improvements

Appendix G - Survey questionnaire

The survey included questions on barriers to recreational game hunting and hunting frequency.

Barriers to recreational game hunting

Would you like to hunt more than you currently do?

- Yes, I would like to hunt more
- No

Using a scale of 1 to 7 where 1 means ‘Not a barrier at all’ and 7 means ‘A major barrier to hunting more’, to what extent are the following barriers to you hunting more than you currently do?

- Cost of hunting equipment
- Availability of hunting equipment
- Ease of access to public hunting locations
- Ease of access to private land for hunting
- Time taken to reach hunting locations
- Availability of facilities such as campgrounds or huts near hunting locations
- General information about recreational hunting
- Accessible information about recreational hunting locations
- Not wanting to waste meat
- Insufficient accredited professional hunting guides
- Time taken to obtain relevant authorisations/accreditations
- Other (please describe)
- There are no major barriers to participating in recreational hunting

How many additional days would you go hunting if these barriers were removed?

- Days: _____

1	Executive summary
2	Introduction
3	Key market insights
4	Approach to the study
5	Economic contribution
6	Social benefits
7	Volunteerism
8	Appendices
A	Trip expenditure
B	Non-trip expenditure
C	Region analysis
D	LGA analysis
E	Town analysis
F	Comparative analysis
G	Survey questionnaire
H	Limitations of the analysis
I	Changes in study scope
J	Potential future survey improvements

Appendix H - Limitations of the analysis

The analysis in this report is subject to some limitations that should be considered when interpreting the results. These relate to data, scope and modelling assumptions.

Limitations of the analysis

BDO acknowledges that there are limitations to this analysis. These include:

1. Reliance on self-reported survey data

Expenditure estimates are based on self-reported survey responses and may be subject to recall error or reporting bias.

The potential impact of this limitation is mitigated in part by the larger sample size, with 2,583 responses (4.5% of Victorian game licence holders), up from 1,671 (3.2%) in 2019.

2. Sample representativeness

While the survey was designed to be representative of Victorian game licence holders, results may not fully reflect the behaviours of all licence holders.

Changes to the 2025 survey design improved representativeness by species, correcting for the over-representation of deer hunters and under-representation of quail hunters observed in 2019.

To further address residual differences, responses were weighted to align with the population across species, gender and age. This approach provides a more robust estimate of total expenditure than applying a uniform sample-to-population weighting across all responses.

3. Excludes non-licensed and junior game licence holders

The analysis excludes expenditure by non-licensed hunters, as the GMA does not collect data or contact details for this group. Junior licence holders are also excluded, as the survey was limited to respondents aged 18 and over, while these licences are issued to individuals aged 12-17.

4. Non-trip expenditure is attributed to game species only, not pest animals

The survey was limited to Victorian game licence holders, for whom deer, duck or quail hunting is the primary purpose of licence ownership. As a result, non-trip expenditure is attributed to these species, even where some hunting activity may target pest animals. This approach is consistent with the 2013 and 2019 studies.

5. Limited representation of game bird hunting at licensed game bird farms

While the survey included questions relating to hunting game birds at licensed game bird farms, no survey responses were received from this cohort. Consequently, hunting game birds at licensed game bird farms could not be separately analysed. The number of licences issued to hunt game birds at licensed game bird farms is relatively small.

6. Input-output modelling

The GSP and FTE impacts in this report were estimated using BDO’s in-house RISE input-output model, which is based on ABS National Accounts input-output tables and updated annually.

While widely used to estimate the economic contribution of existing levels of economic activity and the economic impacts of shocks, input-output models have limitations, including:

- Fixed input coefficients that may not reflect changing economic conditions
- No allowance for substitution between inputs or sectors
- No supply constraints where demand exceeds available capacity

1	Executive summary
2	Introduction
3	Key market insights
4	Approach to the study
5	Economic contribution
6	Social benefits
7	Volunteerism
8	Appendices
A	Trip expenditure
B	Non-trip expenditure
C	Region analysis
D	LGA analysis
E	Town analysis
F	Comparative analysis
G	Survey questionnaire
H	Limitations of the analysis
I	Changes in study scope
J	Potential future survey improvements

Appendix I - Changes in study scope (2025 vs 2019)

The 2025 study expanded the scope of the 2019 analysis, introducing pest species disaggregation, a more representative survey design and new insights on wellbeing, volunteering and participation.

Scope area	2025 study approach	2019 study approach
Economic contribution approach	The scope of the 2025 study, as determined by DJSIR, was to estimate gross economic contribution only, rather than net contribution. This approach is consistent with key outputs from previous studies. Gross contribution provides a measure of the economic activity directly supported by recreational hunting. Net contribution is highly sensitive to assumptions about expenditure substitution and is typically reported as a range, as demonstrated in previous studies and the Parliamentary Budget Office’s inquiry submission in 2023.	The 2019 study estimated both gross and net economic contribution. Net contribution was modelled using scenario-based assumptions about how expenditure might be reallocated in the absence of hunting (e.g. to alternative outdoor activities or general household spending). This resulted in a wide range of estimates, including: • \$356 million gross contribution to GSP • \$57 million net contribution to GSP under low substitutability • \$19 million net contribution to GSP under high substitutability
Pest species disaggregation	The 2025 survey disaggregated pest animals by species (i.e. fox, rabbit, pig and goat), providing more granular insight into the economic contribution of recreational pest hunting by licensed hunters.	The 2019 survey did not disaggregate pest animals by species, limiting visibility of differences between species.
Survey representativeness	The 2025 survey design improved representativeness by species through a revised quota, correcting for the over-representation of deer hunters and under-representation of quail hunters observed in 2019.	The 2019 survey sample exhibited an over-representation of deer hunters and an under-representation of quail hunters.
Survey scope	The 2025 survey expanded its scope to include: • Volunteering activities • Barriers to increased participation among existing hunters This expanded scope provides additional insight into wellbeing outcomes, volunteering contributions and constraints on participation.	The 2019 study did not capture volunteering activity or barriers to participation.

1	Executive summary
2	Introduction
3	Key market insights
4	Approach to the study
5	Economic contribution
6	Social benefits
7	Volunteerism
8	Appendices
A	Trip expenditure
B	Non-trip expenditure
C	Region analysis
D	LGA analysis
E	Town analysis
F	Comparative analysis
G	Survey questionnaire
H	Limitations of the analysis
I	Changes in study scope
J	Potential future survey improvements

Appendix J - Potential future survey improvements

Building on the 2025 survey design, there are opportunities to further enhance the scope and depth of data collected in future studies.

Potential future survey improvements

BDO notes that there are opportunities to further enhance the scope and depth of future survey design. These include:

1. Volunteering measurement

Volunteering was captured for the first time in the 2025 survey, providing a high-level indication of the contribution made by recreational hunters across a range of conservation and community activities.

Future surveys could expand the scope of volunteering to provide a more comprehensive view of contributions, including additional activities (e.g. fire and wildlife rescue) and organisations (e.g. Scouts, Rotary, SES, CFA).

Reported hours for pest control activities were relatively high. Future surveys could refine how this question is framed to better distinguish between recreational hunting of pest animals and other forms of pest control.

2. Barriers to increased participation and entry

Barriers to participation were also captured for the first time in the 2025 survey and reflect constraints experienced by existing hunters in relation to increased participation. These are likely to differ from the barriers faced by non-participants or individuals considering entry into recreational hunting.

Future surveys could expand this analysis to include individuals who have not hunted in the past 12 months, to better understand barriers to entry (e.g. time, cost and health).

Disclaimer notice

You must read this disclaimer notice as a condition of accessing this Report and any information contained herein.

This disclaimer notice must be read by any party who is provided with a copy of or access to on a non-reliance basis, BDO Services Pty Ltd's (BDO) Economic Contribution and Social Benefits of Recreational Hunting in Victoria (Report), dated 8 September 2026 prepared for the Department of Jobs, Skills, Industry and Regions (Client).

In consideration of BDO providing access to the Report on a strictly non-reliance basis, and as a condition of you accessing it, you accept and agree to the terms of this disclaimer notice.

1. The Report is being provided to you on a non-reliance basis only.
2. The Report was prepared by BDO for the Client in accordance with BDO's engagement terms with the Client and no other purpose.
3. You must not use or rely on the Report (in whole or in part) and if you do so, it is at your own risk.
4. To the maximum extent permitted by law, BDO disclaims and does not accept or assume any duty, responsibility or liability to you (or any other party) for or in relation to:
 - a. The work undertaken by BDO, the Report or its contents (including any conclusions, opinions or recommendations that BDO has formed or made in the Report); or
 - b. Any loss you or any other party may suffer (without limitation whether in contract, tort (including negligence), indemnity or statute) in connection with or arising from you accessing the Report, your use or reliance on the Report in contravention of this disclaimer notice or any other contravention of the terms of this disclaimer notice by you, your officers, employees, contractors, agents, related bodies corporate or associated entities (as those terms are defined in the Corporations Act 2001 (Related Entities)).
5. The Report addresses the specific requirements of the Client and does not contemplate, nor will it necessarily address your specific circumstances, interests or requirements.
6. The Report may not be sufficient for your purposes because it was not prepared for or in contemplation of your purposes or circumstances and you alone will need to determine the extent to which BDO's work and the Report may be suitable for your purposes. The Report may include information and conclusions that may be assessed differently by you and it may not consider or address issues or interests that are of importance to your circumstances. You must make your own enquiries and undertake your own review and assessment of the Report (including the information and conclusions therein), the matters to which the Report relates and any matters arising from or relating to the Report and its contents.
7. BDO has not carried out an audit or any assurance of the information considered in preparing the Report.
8. You acknowledge and agree BDO does not have any obligation or responsibility to you or any other party to update the Report to take into account any information, events, matters or circumstances (Information) arising since the date the Report was prepared or to notify you or any other party about the Information, including if BDO becomes aware of the Information, the Information is inconsistent with the contents of the Report or the Information may impact the validity of the information, comments or conclusions contained in the Report.
9. You agree that if you have placed undue or unreasonable reliance on the Report it is solely at your risk and BDO has no duty, responsibility or liability to you or any other party.
10. To the maximum extent permitted by law, BDO makes no express or implied warranty or representation in respect of the Report, including as to its quality, adequacy, accuracy or completeness to you or any other party (other than the Client as set out in the terms of BDO's engagement with them).
11. BDO owns and retains all copyright and all other intellectual property rights in the Report.
12. You agree to release and forever discharge and hold harmless BDO and its Related Entities (BDO Group) from and against any loss, damage, costs (including legal costs on a full indemnity basis), expenses, liability, action, claim, suit, demand or proceedings (without limitation whether in contract, tort (including negligence), indemnity or statute) (Claim) arising from or in connection with you accessing the Report, your use or reliance on the Report or any contravention of this disclaimer notice by you or your Related Entities.
13. You agree to indemnify and defend the BDO Group against any Claim arising from or in connection with you accessing the Report, your use of or reliance on this Report (or any information therein) or any contravention of this disclaimer notice by your or your Related Entities.

1300 138 991
www.bdo.com.au

AUSTRALIAN CAPITAL TERRITORY
NEW SOUTH WALES
NORTHERN TERRITORY
QUEENSLAND
SOUTH AUSTRALIA
TASMANIA
VICTORIA
WESTERN AUSTRALIA

AUDIT • TAX • ADVISORY

This publication has been carefully prepared but is general commentary only. This publication is not legal or financial advice and should not be relied upon as such. The information in this publication is subject to change at any time and therefore we give no assurance or warranty that the information is current when read. The publication cannot be relied upon to cover any specific situation, and you should not act, or refrain from acting, upon the information contained therein without obtaining specific professional advice. Please contact the BDO member firms in Australia to discuss these matters in the context of your particular circumstances.

A.C.N. 050 110 275 Ltd and each BDO member firm in Australia, their partners and/or directors, employees and agents do not give any warranty as to the accuracy, reliability or completeness of information contained in this publication nor do they accept or assume any liability or duty of care for any loss arising from any action taken or not taken by anyone in reliance on the information in this publication or for any decision based on it, except in so far as any liability under statute cannot be excluded.

A.C.N. 050 110 275 Ltd ABN 77 050 110 275, an Australian company limited by guarantee, is a member of BDO International Ltd, a UK company limited by guarantee, and forms part of the international BDO network of independent member firms.

BDO is the brand name for the BDO network and for each of the BDO member firms.

© 2026 A.C.N. 050 110 275 Ltd. All rights reserved.

25-06-1970