

YARRA VALLEY AND  
DANDENONG RANGES

DESTINATION  
MANAGEMENT PLAN

KEY FINDINGS  
PAPER

MARCH 2023



YARRA RANGES TOURISM

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## ACKNOWLEDGMENT OF COUNTRY

Yarra Ranges Tourism acknowledges the Wurundjeri Woi Wurrung, Bunurong and Taungurung peoples of the Kulin Nation as the traditional custodians of the lands and waters of the Yarra Valley and Dandenong Ranges on which we live, work and play and pay our deepest respect to Elders past and present.

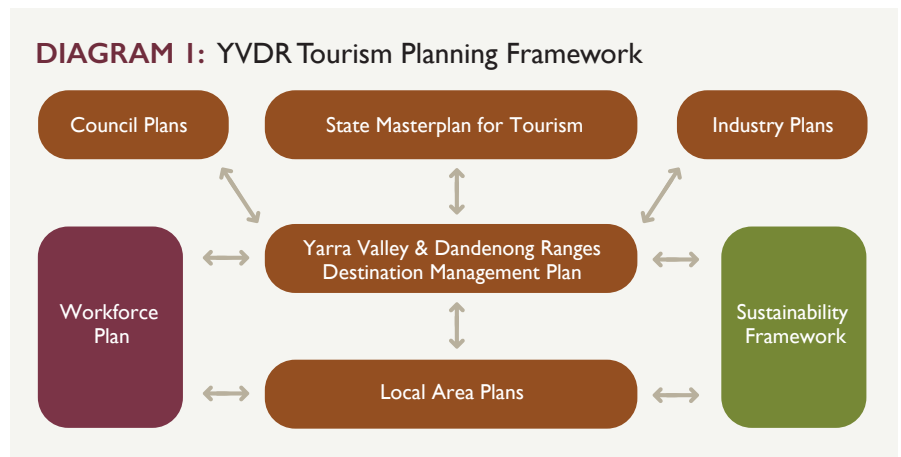
## PROJECT OVERVIEW

Yarra Ranges Tourism (YRT) is developing a comprehensive 10-year Destination Management Plan (DMP) for the Yarra Valley and Dandenong Ranges (YVDR) region that will be underpinned by four Local Area Plans.

### What is a Destination Management Plan and Why Do We Need One?

A Destination Management Plan (DMP) is a shared strategic plan that outlines the management and development initiatives for tourism across a region such as the YVDR. It is a catalyst for a more connected and collaborative approach and includes a range of sustainable objectives and actions to enhance the benefits of tourism whilst minimising potential negative impacts. The DMP is one of the key tools that supports tourism from state to local levels (see Diagram 1).

The aim of this DMP is to help manage the YVDR for residents, visitors and industry over the next 10 years as visitation to the region increases significantly. To ensure future success, the DMP is being built with the collaboration of many groups, including Traditional Owners, state and local governments, tourism businesses, community



organisations, local residents and visitors to our region.

The DMP aims to enhance the quality of life for YVDR residents whilst also supporting industry and creating a positive and sustainable experience for visitors. At its core, the DMP will seek to enhance the benefits of tourism to the local economy and minimise related issues to grow the already very strong “social license for tourism” amongst the local community.

*In this context we use the “social license for tourism” as the level of support and acceptance of tourism in the YVDR by the local community.*

With the importance of the Green Wedge and the natural environment to both the local community and visitors across the region, regeneration and sustainability is central to this project. To ensure world’s best practice, the DMP will utilise the Global Sustainable Tourism Council’s Destination Criteria which incorporates the United Nations Sustainable Development Goals (see Diagram 2). Balancing regeneration and sustainability, along with development and economic growth, can be challenging. This is why detailed research, informed planning and collaboration actions, as outlined in this DMP, are so important.

### DIAGRAM 2: Sustainability framework

It is imperative that this DMP adopts world’s best practice in ensuring regeneration and sustainability for the YVDR region.

To bring this to fruition the DMP has been informed by the GSTC Destination Criteria which are:



- Sustainable Management
- Cultural Sustainability
- Socio Economic Sustainability
- Environmental Sustainability

These criteria are aligned to and support the United Nations Sustainable Development Goals (SDGs).

## SUSTAINABLE DEVELOPMENT GOALS

Through the preliminary analysis undertaken, it is expected that outcomes related to the following SDGs will be achieved:



All actions under the final DMP will be linked back to this sustainability framework.

## PROJECT OVERVIEW

### What will the YVDR look like in 10 years?

With Melbourne predicted to become the largest city in Australia over the next 10 years to 6.6 million, there will be an increase in the number of residents in YVDR of nearly 25% - 80,000 extra residents. Additionally, the surrounding population, in the south and north of Melbourne, which are in direct proximity to the YVDR, has an even higher growth forecast (Whittlesea 63%, Hume 54%, Cardinia 66%, Casey 54%).

Currently, day visitation to the YVDR is 4.5m per annum. With the growing population of Melbourne and improved transport links to the region, such as North East Link expected to be

completed in 2028, the number of day visitors alone is expected to more than double by 2033 – to an estimated 9.1m day trips, with the majority on weekends. Adopting a “do nothing” approach is not a solution and a key priority for this DMP is to identify ways to manage and protect the overall liveability of the region.

The Destination Vision that has been developed for the region, as part of this Key Findings Paper, captures the aspirations of the community and industry. It responds to the market research, consultation and trends for visitors. The purpose of this DMP is to ensure that the region maintains its connection to the natural environment

while improving the liveability of the region for residents through the development of new and improved infrastructure, experiences and attractions that will encourage longer, more connected visitation.

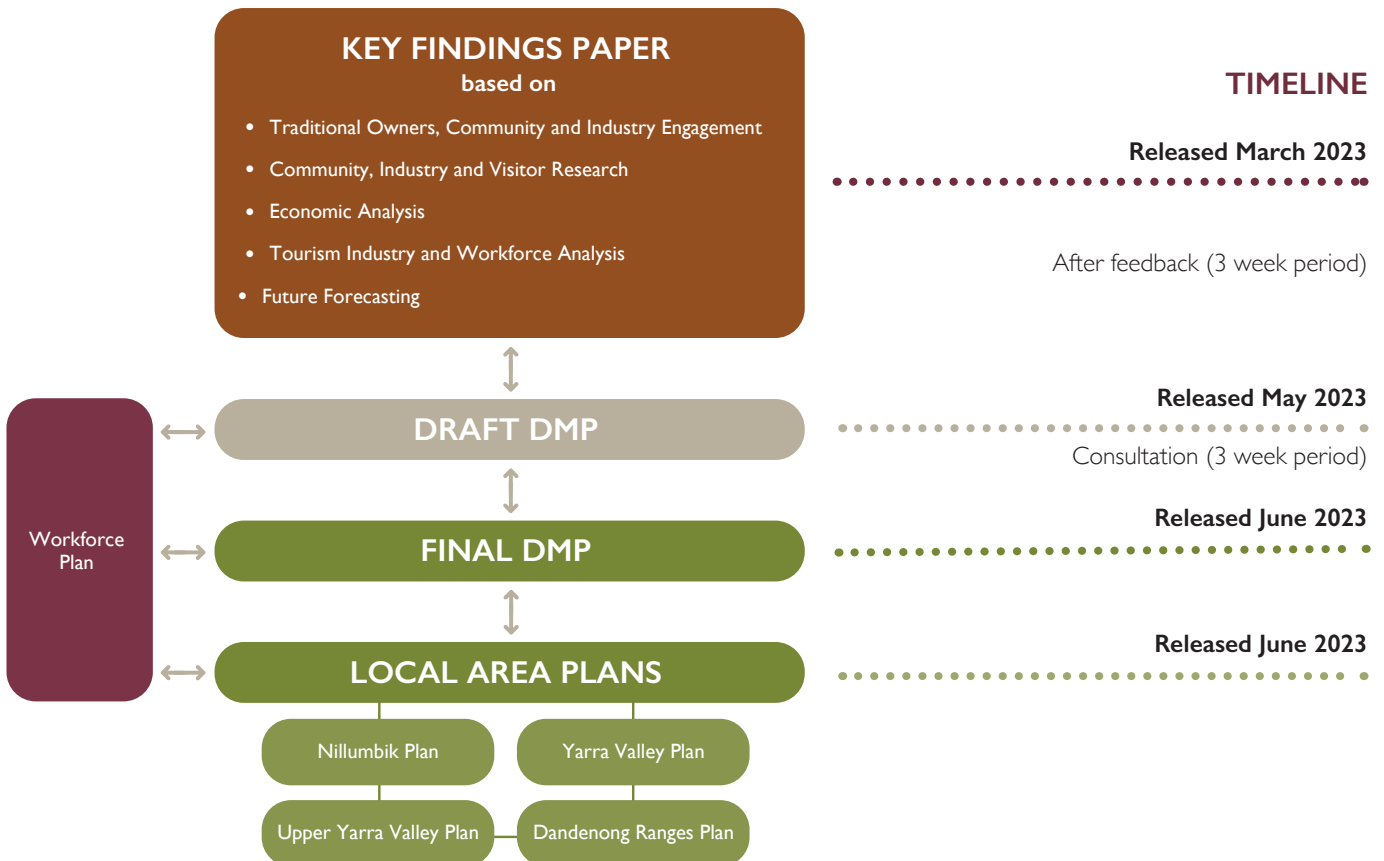
### How can you help shape the DMP?

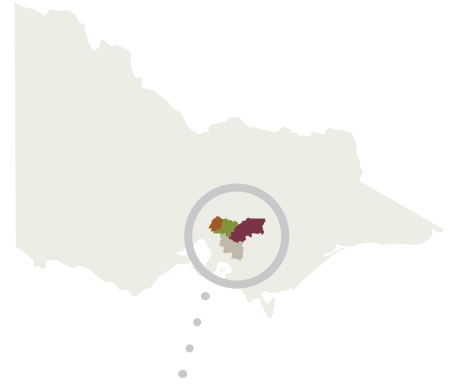
This Key Findings Paper identifies the preliminary vision, objectives and key priority areas for tourism in the YVDR over the next 10 years. It consolidates work undertaken to date and is a key step in the development of the DMP (See Diagram 3). Thank you for your interest in this important work for the future of the region. Please let us know your thoughts on these findings and priority areas.



To provide feedback send your comments to:  
[stacey@yarrarangestourism.com.au](mailto:stacey@yarrarangestourism.com.au)

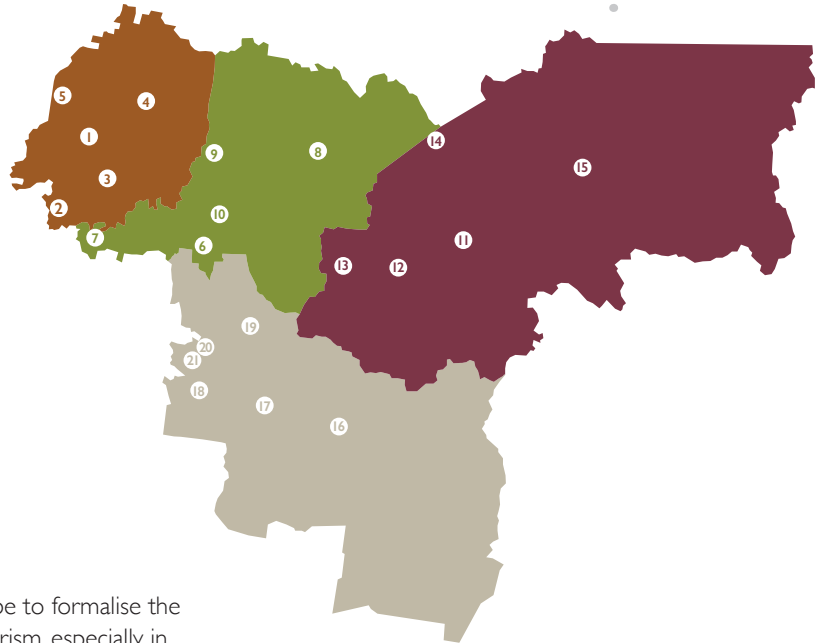
**DIAGRAM 3:** How did we develop these Key Findings?





# OVERVIEW OF REGION AND LOCAL ECONOMIC INDICATORS

The area of interest for this DMP is defined by the National Visitor Survey and shaped by the Project Steering Committee and funding partners. This includes all of the Yarra Ranges and Nillumbik Shire Council areas. In addition, it includes part of the Cardinia Shire Council area plus Warrandyte-Wonga Park from the Manningham City Council area.



The four Local Area Plan areas are:

- Nillumbik
- Yarra Valley
- Upper Yarra Valley; and
- Dandenong Ranges

One of the recommendations in the DMP will be to formalise the overall regional boundaries for Yarra Ranges Tourism, especially in the southern parts of the Dandenong Ranges area.



## NILLUMBIK

Local towns include:

- 1 Hurstbridge
- 2 Eltham
- 3 Kangaroo Ground
- 4 St Andrews
- 5 Doreen



## YARRA VALLEY

Local towns include:

- 6 Lilydale
- 7 Warrandyte
- 8 Healesville
- 9 Yarra Glen
- 10 Coldstream



## UPPER YARRA VALLEY

Local towns include:

- 11 Warburton
- 12 Yarra Junction
- 13 Woori Yallock
- 14 Reefton
- 15 Fernshaw



## DANDENONG RANGES

Local towns include:

- 16 Gembrook
- 17 Emerald
- 18 Belgrave
- 19 Silvan
- 20 Olinda
- 21 Sassafra



**These local areas were developed based on detailed economic analysis of the visitor economy in each region. This included:**

- size of the visitor economy
- international / national visitor profile
- length of stay
- activities and attraction in each area; and
- day trip versus overnight visitation.

For example, Yarra Valley has a much higher percentage of international visitors than Upper Yarra Valley. Whilst Upper Yarra Valley has the highest percentage of day trips.

# ECONOMIC ANALYSIS

The Yarra Valley and Dandenong Ranges faces three major strategic challenges in developing its tourism industry and related visitor economy.

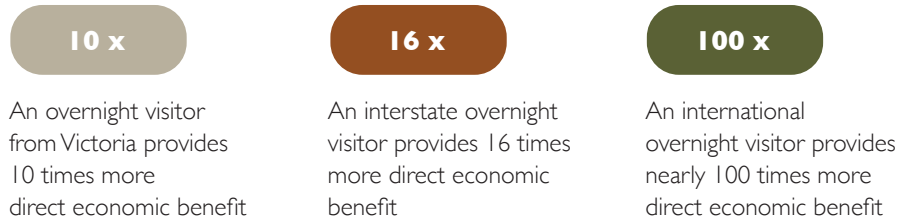
## HIGHEST RATIO OF DAY TRIPS TO OVERNIGHT TRIPS OF ALL REGIONS OF VICTORIA



The Yarra Valley and Dandenong Ranges has the **highest ratio of day trips to overnight trips** of all regions of Victoria.

This is partly due to the combination of easy access from Melbourne, the lack of evening attractions and a related shortage of visitor accommodation. **For every overnight trip there are 10 day trips, which is the largest in the state.** This is expected to worsen as day trips to the region will double in the next 10 years from **4.5m to 9.1m** per annum.\* This poses significant risks for the liveability of the region and the visitor experience if nothing is done to address this core challenge.

Overnight stays provide much better economic impact than day visits, For example:



\*ODIN360 forecasts have been built using Tourism Research Australia National forecasts, and proprietary analysis techniques based on other industry data, population forecasts and economic indicators.

## 2 HIGH CONCENTRATION OF TRIPS ON THE WEEKEND



Related to the first challenge, the region has a high concentration of trips on the weekend compared to other regions of Victoria. These high ratios lead to greater challenges in justifying investment in tourism due to the lack of visitation across the week. This can be seen in limited accommodation options and volumes in the region as operators do not have confidence in returns with only a limited period of the week driving revenue.

Other challenges include finding staff, creating a night-time economy and opening throughout the week. This concentration of visitation can cause overcrowding and other issues that impact the local community and affect the liveability of the region. This may impact the level of community support for tourism, compared to a more even spread of visitation across the week.

## 3 SKILLS AND LABOR SHORTAGES



In addition to the two long-term challenges, the COVID period left a hangover of skills and labour shortages. Many staff left the tourism industry for other sectors and international backpackers and students are only slowly returning to Australia and struggling to find affordable accommodation in the YVDR region.



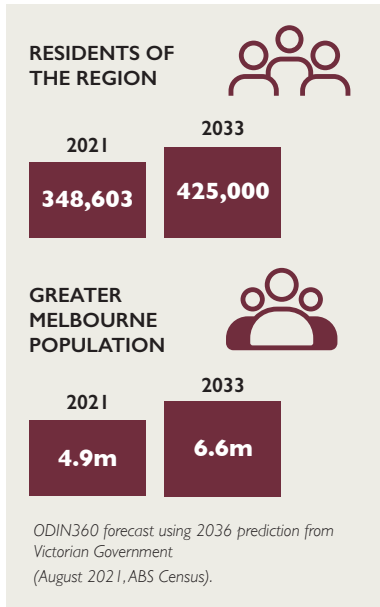
Pre-COVID (2018-19) **ONE JOB IN TEN** in the YVDR region was due to direct impacts of visitor spending.



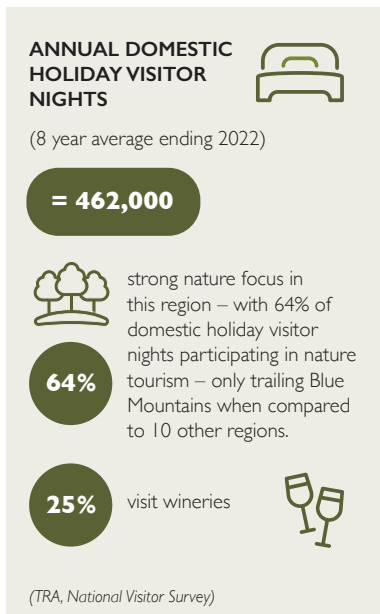
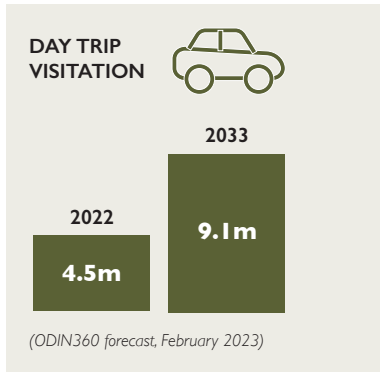
During the COVID period (2020-21) this fell to **ONE JOB IN 20** as the region's visitor economy is recovering slowly.

# KEY REGIONAL MEASURES

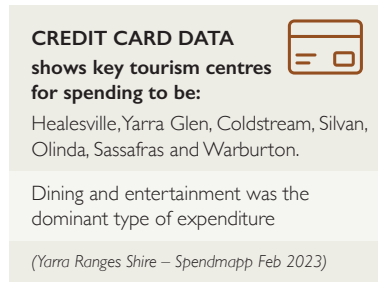
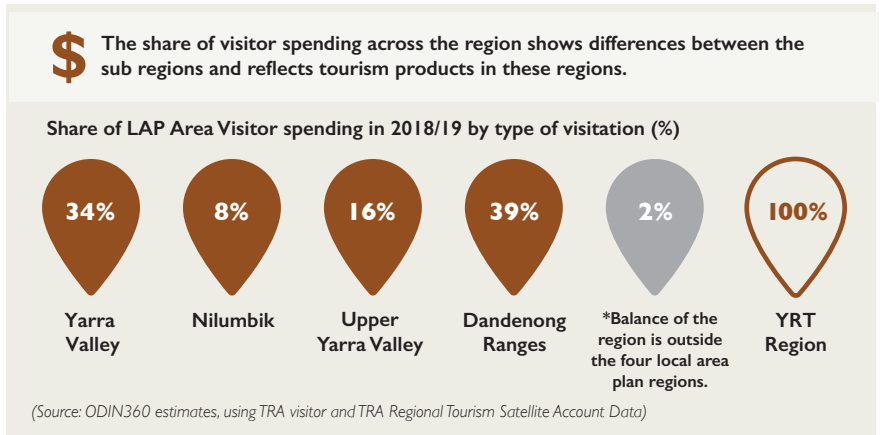
## POPULATION



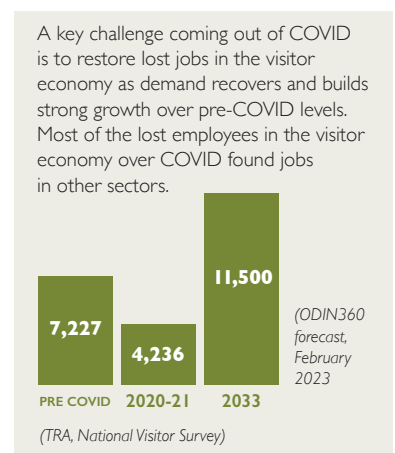
## VISITATION



## TOURISM SPEND

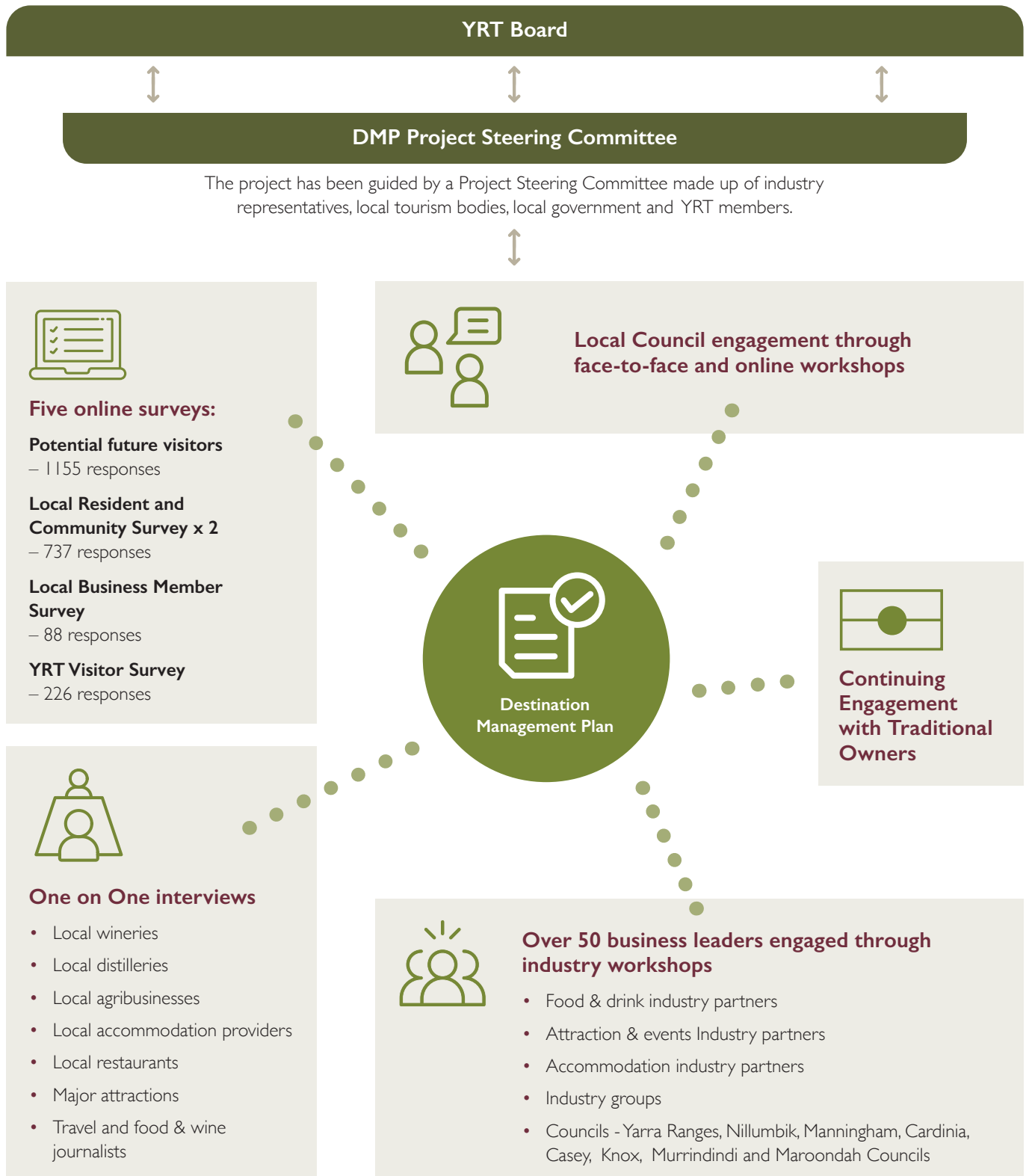


## EMPLOYMENT



# OVERVIEW OF CONSULTATION AND ENGAGEMENT

Extensive consultation has been held across the region with Traditional Owners, State Government, multiple local councils, tourism industry, potential visitors and the local community. Consultation involved one on one meetings, workshops, surveys and market research. **Over 2,300 people** have had input during this process.





# SWOT ANALYSIS OVERVIEW

The research, consultation and engagement has helped formulate this overarching analysis of the Strengths, Weaknesses, Opportunities and Threats (SWOT) of the region:



## STRENGTHS

**What is great about tourism in the region?**

- Residents love the lifestyle of the region with the peace and quiet and being close to nature key attributes
- Location: Close proximity to Melbourne, yet parts of the region still remain “undiscovered”
- Natural attributes: Open green spaces and link to the Yarra River: Strong trails network facilitating hiking, biking (mountain bike and cycling) and water-based activities on the Yarra River
- Food and beverage options: Many wine and dining experiences
- 9 in 10 residents believe that tourism is important for the region
- Home for creatives and “makers”: From artists, to local farmers, and wine and gin brewers and distilleries
- Puffing Billy, Chocolaterie, Healesville Sanctuary, our Natural landscape and Wineries are key reasons for visitation
- Arts and culture experiences across the region
- North-East link access in 2028
- Diverse all-seasons destination



## WEAKNESSES

**What could be better about tourism in the region?**

- Over indexed day trip visitation
- Limited mid week and night-time economy for locals and visitors
- Awareness of the region in high value target markets – international and interstate
- Transport around the region
- Mid-range and lower-cost accommodation options, including for family and workforce
- Services and infrastructure – roads, public transport, waste management, WIFI
- Beautification of township and place making
- Knowledge of diversity of experiences among local residents and the broader market
- Accessibility – walkability, proximity, disability consideration
- Perception of the area as a worthwhile investment
- Yarra Valley has a lower share of total leisure visitor nights who visit wineries on their trip than do Australia’s other premier wine-growing areas
- Lack of sufficient signature or high profile food and drink products
- Workforce skill gaps and shortages in key roles



## OPPORTUNITIES

**What opportunities are there to provide more sustainable and regenerative tourism in the region?**

- Create a sustainable tourism industry and visitor economy that supports the local community ie, permits to include sustainable principles
- Capitalise on township plans and existing development areas that provide quick-win opportunities
- Facilitate and streamline planning to encourage investment in accommodation, attractions and opportunities in Special Use Zones (SUZs)
- Improve stakeholder collaboration across high-interest projects and advocacy for shared projects
- Develop a sustainable signature event showcasing the core product priority strengths of the region
- Integrate event opportunities, ie, outdoor and trail activity with festivals, events, open studios etc.
- Build a central experience visitor hub, including central cellar door and agribusiness markets
- Develop a traffic masterplan, including for park and ride options
- Develop a Yarra River masterplan across multiple Councils to boost access for canoeing, kayaking and other water activities
- Raise awareness of region’s trails and the arts, culture and heritage experiences across the region
- Integrate Traditional Owner stories and other historical stories into the region
- Elevate wellness opportunities to become known as the next “wellness hub”
- Lift food and cellar door experiences to match the high standard and reputation of the region’s wine
- Increase length of average visitor stays, and boost mid-week stays
- Broaden night-time experience for locals and visitors. This will also assist with workforce issues



## THREATS

**What issues threaten tourism activities in the region now and in the future?**

- Over tourism of the region from day trippers now and into the future
- No ride share or taxi system in the region
- Planning scheme is complex and in order to undertake reform it needs support of local councils and State Government
- Planning Scheme controls are costly and complex for landowners to navigate
- Duplication of local tourism associations and services
- Weekend road congestion
- Climate change impacts, ie, floods and bushfires, reduce the sense of safety in the region for visitors and local community
- Affordability of accommodation, food and tourism related activities is a concern for visitors
- Housing – Airbnb taking rental properties out of local housing market, and short supply of low-cost housing for workforce
- Labour force issues – especially mid-week impacting service and experience, prompting visitation to move to weekend
- Visitor accommodation doesn’t meet demand, hampering ability for overnight and longer stays.
- Insurance coverage for businesses

# SOME INITIAL INSIGHTS FOR A SHARED VISION

## Key attributes for a shared vision included:

### Nature on Melbourne's doorstep:

A clean and green playground with unique flora and fauna.

### Active and healthy lifestyle:

A destination that offers diverse outdoor activities – walk, run, hike, cycle, paddle, golf and snow – for active and healthy lifestyles.

### Wellness:

A fresh air escape and personal restorative experience that leaves visitors refreshed and inspired.

### Unique local experience:

More boutique destination, less mass tourism. Offers genuine engagement and hands-on experiences with the region's community, including local makers, artists and creators.

### Quality recommendation:

From food and wine, to nature and art – a place you tell your friends about.

### Maintain a sense of discovery:

Slow experiences, rather than point to point transactions, to enhance the discovery of the region.

### Indigenous culture:

Permeates and is woven into the experience.



### Events worth travelling for:

Premier and well-run events that make journey worthwhile and don't overcrowd with accommodation nearby.

### Sustainability:

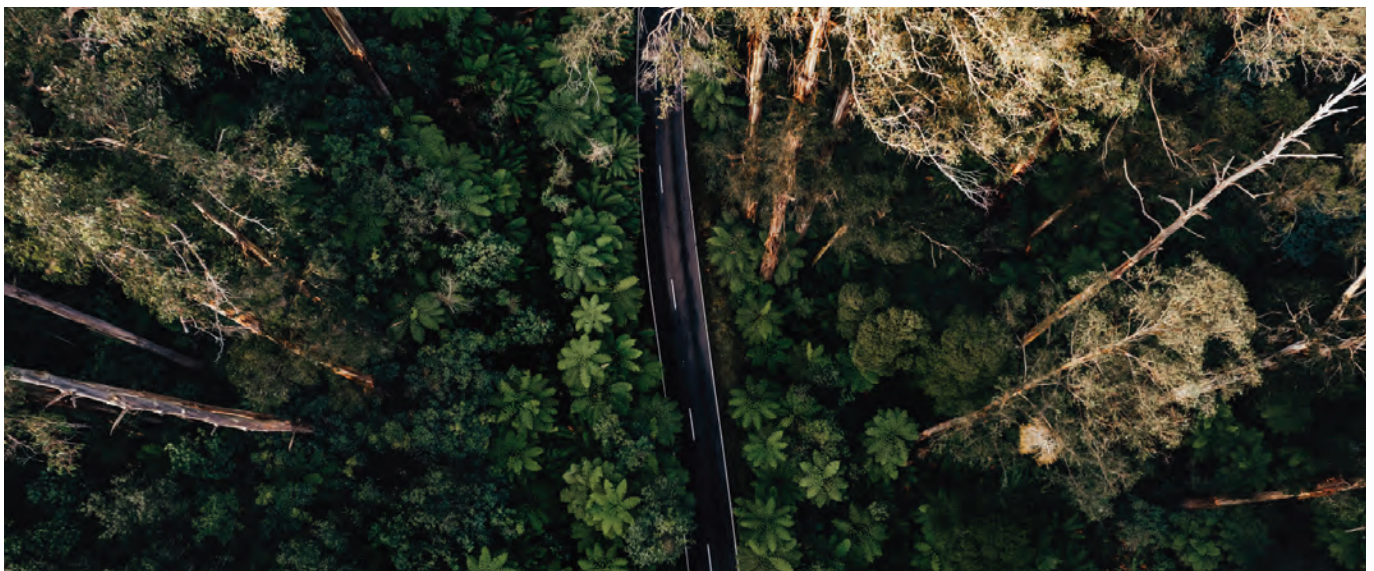
A core value within the region and attractor for visitors.

### Tourism for all:

Locals to benefit from tourism through increased services and infrastructure to support tourism, more jobs and businesses, greater amenity and investment in services that supports residents as well as visitors.

### Accessibility:

A region open to everybody to enjoy.



## THIS DESTINATION VISION IS SHAPED BY DISCUSSIONS WITH THE COMMUNITY, INDUSTRY AND VISITORS

**The Yarra Valley and Dandenong Ranges is a diverse region that has a range of attributes that visitors and residents identify with. However, a stand out that comes across in all the research and analysis is the region's connection to nature.**

The Green Wedge area and our other natural attributes that envelope the region are a key strength that should be protected to ensure future visitation and the ongoing liveability of the region. The region is commonly referred to as the "Lungs of Melbourne" and offers a plethora of opportunities for people to undertake both active and passive natural experiences.

This connection to nature is represented in more than just the natural landscape and scenery. The Traditional Owner's culture and stories from the region, local provenance of food and drink, coupled with agri-business opportunities at farm gates, the thriving arts and culture scene and the key attractions of the region all have a strong connection or are linked to nature.

While we have certainly identified that residents, businesses and visitors all align with this aspect of the region it is also important to understand what the future holds and how it may impact our long term vision for the region. The key market trends also indicate a growing attraction to wellness and the restorative sense of nature and the connection to the environment with nature based tourism and sustainability key factors for some leisure segments. The children of today (our future visitors and residents) talk about "touching grass" after being immersed in the digital world. This strong connection to nature to the region we believe will only grow stronger:

**While there is a strong connection to nature in the region, we also want to impress our visitors with the outstanding experiences and services that the region offers both residents and visitors. The aspiration is to create a memorable destination that drives referrals to family and friends that are looking at their next holiday destination. This aspiration is reflected in our destination vision:**

**Naturally *Impressive***



**Does this Vision resonate with your view of the region?**



## OUR CORE CHALLENGE

A business-as-usual approach to tourism in the region will see the current strong social licence for tourism erode rapidly. This will be due to the forecasted increase in day trip visitation, particularly on weekends. This rise in day trip visitation will be mainly due to improved access to the region from Melbourne and significant adjacent population growth.

If nothing changes the region will see increased day trip visitation move from **4.5m to 9.1m visitors per year over the next 10 years**. This will significantly impact liveability and social licence for tourism.

The challenge of higher day trip visitation impacts this region much more significantly than other tourism destinations across the state. If not addressed, it will threaten the 11,500 jobs and the \$2.3 billion attributed to visitor spending by 2033.



Therefore the purpose of the DMP must be:

**To enhance the liveability of the region, lift social licence for tourism and grow the visitor economy in a sustainable manner.**

## PROJECT OBJECTIVES OVERVIEW

To address this core challenge the DMP identifies the following objectives



Do you agree with the objectives identified?

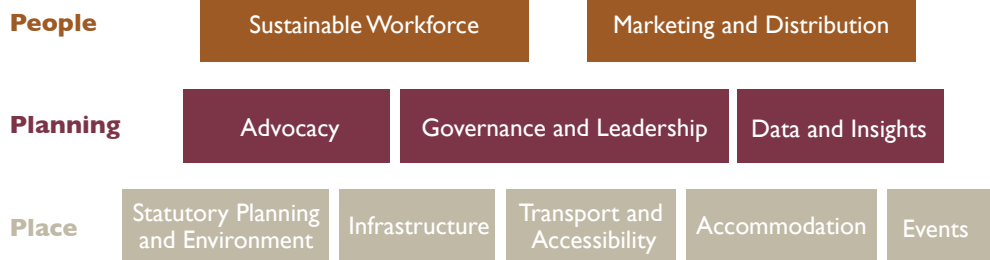
**Destination Vision** | **Naturally Impressive**

**Destination Product Priorities:**  
To focus the region and its resources our initiatives will address the key product priorities



This DMP is underpinned by Destination Enablers which will help drive our Destination Product Priorities

**Destination Enablers:**  
Will help us to position the region for success



# STRATEGIC DIRECTIONS

In listening to stakeholders throughout the consultation it is clear that many of the issues identified here are not new. This DMP has however enabled the collection of these issues and opportunities to establish a framework that identifies a way to move forward and address them over the next 10 years in alignment with Victoria’s Visitor Economy Master Plan.

The strategic directions outlined here will be further developed with actions addressing how we will achieve our vision as part of the development of the DMP once feedback is received.

Product Priority	Vision
<p>Nature</p>	<p><b>Vision:</b></p> <p>The vision is to harness the tremendous potential of our region’s natural beauty and features. We aspire to protect and preserve our unique sites through sustainable accessibility and infrastructure development. Our focus is to raise awareness of these precious assets and their importance to our community. By promoting responsible tourism, we aim to strike a balance between development and preservation to ensure that our region’s natural surroundings continue to be enjoyed by future generations. Our goal is to create a vibrant, thriving economy that supports our community and visitors alike, while maintaining our region’s natural beauty.</p>
<p>Food and Drink</p>	<p><b>Vision:</b></p> <p>The vision is to establish the Yarra Valley and Dandenong Ranges as a premier food and drink destination that celebrates our region’s unique offerings. By showcasing the full breadth of our products and expanding accessibility beyond weekends and lunch times, we aim to address the day trip issues facing the region.</p> <p>The focus is on promoting local provenance, protecting product integrity and quality, and fostering collaboration to build a sustainable and resilient food and drink ecosystem that supports our community and delights visitors.</p>
<p>Traditional Owners</p>	<p><b>Vision:</b></p> <p>As the Traditional Owners across the majority of the region, it is imperative that the values of the Wurundjeri Woi Wurrung are embedded in the plan. Consultation is continuing with the Wurundjeri Woi Wurrung Cultural Heritage Aboriginal Corporation to support this, and the DMP will identify how the tourism industry will uphold these values. It will also be an opportunity for Wurundjeri to lift up their enterprise objectives and ambitions across the region. Engagement will also occur with the Indigenous communities that are Traditional Owners of other areas within YVDR.</p>

# STRATEGIC DIRECTIONS

Product Priority	Vision
<p>Tours and Attractions</p>	<p><b>Vision:</b> The vision is to promote multi-stop, multi-day, mid-week, and night tours to encourage longer stays and shift visitation away from weekends. We will explore the role of tours and attractions in programming and pricing, and collaborate to develop the night-time economy of the region. By doing so, we will create a more vibrant and sustainable tourism industry that benefits both visitors and the local community.</p>
<p>Wellness</p>	<p><b>Vision:</b> The vision is to capitalise on the emerging trend of wellness travel in the region by leveraging the natural attributes of the area and complementing them with existing products. With a world-leading wellness operator coming to the region, we are well positioned to offer multi-dimensional wellness activities, including Sleep, Eat, Spa, Move, Mindfulness, and Grow. By doing so, we will attract higher-yield visitors and establish the region as a premier destination for wellness travel, providing opportunities for growth and economic development.</p>
<p>Arts and Culture</p>	<p><b>Vision:</b> The vision is to collaborate as a region to increase awareness of the arts, culture, and heritage products that currently exist and identify opportunities for future visitation. We will showcase the leading galleries, museums and heritage experiences to encourage mid-week and longer stays, supporting a more sustainable and diverse tourism industry. By working together to promote the rich cultural offerings of the region and create memorable experiences for visitors.</p>

**Q** Are there any other Destination Product Priorities that should be included or any changes made to the specified priorities?





# STRATEGIC DIRECTIONS

Priority Area	Vision
<p><b>People</b></p>	
<p><b>Sustainable Workforce</b></p>	<p><b>Vision:</b> The vision is to proactively address the challenges of workforce management in response to the changing global and local trends in tourism and workforce participation, including the impact of COVID. The region will embrace the unique challenges posed by its location and address the need for a stronger night-time economy to cater to the disproportionate level of weekend visitation. Through collaboration and innovation, the region will create a resilient and adaptable workforce that supports the continued sustainable growth of the visitor economy.</p>
<p><b>Marketing and Distribution</b></p>	<p><b>Vision:</b> The vision is to provide seamless access to information and resources for visitors to our region, driving awareness and assisting with holiday planning, as well as encouraging visitors to explore and discover all that the region has to offer. We will provide support and training to our businesses to help them better market their products and services to visitors, and increase awareness of our unique experiences among high-value international and interstate visitors. We will collaborate on activities and initiatives to make the most of limited budgets and achieve our goal of creating a thriving, sustainable visitor economy in our region.</p>
<p><b>Planning</b></p>	
<p><b>Advocacy</b></p>	<p><b>Vision:</b> The vision is to bring together the various communities in the region to advocate for government investment that will benefit both residents and visitors. By prioritising emerging issues and reaching agreement among stakeholders, we can ensure that the region is well-equipped to meet the needs of all who call it home or come to visit.</p>
<p><b>Governance and Leadership</b></p>	<p><b>Vision:</b> The vision is to ensure effective collaboration and streamlined coordination among all organisations involved in the visitor economy, with clear roles and responsibilities, to drive the best outcomes over the next 10 years. This will require sufficient funding for the peak tourism agency and a commitment to work together towards common goals. By doing so, we can create a more cohesive and efficient approach to the development of the visitor economy in the region, leading to increased economic growth and a better visitor experience.</p>
<p><b>Data and Insights</b></p>	<p><b>Vision:</b> The vision is to establish a centralised resource for data and insights that will empower stakeholders to make informed decisions that drive positive outcomes for the region. This resource will bridge the gap in data and provide valuable insights to help the region thrive.</p>

# STRATEGIC DIRECTIONS

Priority Area	Vision
<p>Place</p> <p>Statutory Planning and Environment</p>	<p><b>Vision:</b></p> <p>The vision is to achieve a balance between development growth and the sustainability of the region's natural attributes. We recognise the importance of the Green Wedges to Melbourne in enhancing the liveability of the area and the visitor economy. The development of tourism infrastructure will be done in a way that maintains the core attributes of the Green Wedge and ensures its long term protection.</p>
<p>Infrastructure</p>	<p><b>Vision:</b></p> <p>The vision is to overcome the various infrastructure challenges faced by the region by developing a clear plan and advocating for significant investment as a collective voice. We will work closely with multiple local governments to make a compelling case for investment in areas such as internet access, waste management, roads, and visitor servicing. We will prioritise the provision of essential services such as public toilets in high traffic areas, parking, and wayfinding to enhance the visitor experience and promote the sustainable growth of the region.</p>
<p>Transport and Accessibility</p>	<p><b>Vision:</b></p> <p>The vision is to develop a sustainable transport strategy and system that enhances the distribution of visitors and addresses the limited network of transport within the region. With an enhanced transport network, visitors will be able to more easily access and explore the region, while residents and workers will have improved mobility and transportation options. By addressing these mobility issues, we aim to create a more accessible and enjoyable experience for all who visit and live in the region.</p>
<p>Accommodation</p>	<p><b>Vision:</b></p> <p>The vision is to increase accommodation options in the region to encourage longer stays and attract visitors who will contribute to the region's economic growth and development. This includes identifying suitable sites for expanded visitor and worker accommodation options – small and large – and a potential accommodation investment prospectus. We will work with local government authorities to streamline planning processes to overcome the challenge of limited accommodation options that have led to a preference for day trips over overnight stays.</p>
<p>Events</p>	<p><b>Vision:</b></p> <p>The vision is to create a new schedule that highlights the core product strengths of the region while providing sustainable events that encourage overnight visitation and diverse experiences.</p>

**Q The Destination Enablers for the region are critical to success, are there any that you feel should be reviewed or prioritised?**



This Key Findings Paper was created by ODIN360 as part of its work in developing the Destination Management Plan for the Yarra Valley and Dandenong Ranges on behalf of Yarra Ranges Tourism (YRT).

