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Palm Cove Customer Journey Review

Summary Report

COLLECTIVE OPPORTUNITY
FOR PALM COVE TO GO
FROM GOOD TO GREAT

MAY 2022

Summary findings

Overall, Palm Cove delivers an experience that broadly meets or exceeds the needs of the target customer profiles, once they're in-region. By taking a wider perspective, this review has demonstrated opportunities for Palm Cove to focus efforts in the pre + post travel stages of the customer journey, building on the existing work already in place.

This is about taking a **well performing destination from 'good' to 'great'**, with the path to progress requiring continued industry collaboration at all levels.

WHAT'S WORKING WELL + OPPORTUNITIES FOR IMPROVEMENT

The following table provides the key points from the Review timeline, across the five main customer journey steps. More detail is provided in the following sections.

	WORKING WELL	PRIORITIES FOR IMPROVEMENT
DREAMING	<ul style="list-style-type: none"> High repeat visitation to region High level of word-of-mouth referrals Presence in TTNQ promotions + famils High volume/value of content Ranking on Google search trends 	<ul style="list-style-type: none"> Greater inclusion of Palm Cove on high volume sites Website ranking + site experience to drive more traffic for specific terms relevant to key customer groups Shift from a product to an experience focus to enhance customer experience + perception of the region More regional itineraries to include Palm Cove
PLANNING	<ul style="list-style-type: none"> Timely response to enquiries in-region High profile product is a drawcard Presence on select industry websites + in itineraries 	<ul style="list-style-type: none"> Clearer Brand Identity + consistency, in line with new Identity A more comprehensive local website with local secrets Increase Palm Cove content on TTNQ website A stronger social media approach to increase presence on key platforms + create a community of advocates Improve profile + presence on travel intermediaries' sites Enhance travel agent awareness + connection to region
BOOKING	<ul style="list-style-type: none"> Individual products offer online booking Accessible multi-channel enquiry methods Individual properties provide region information 	<ul style="list-style-type: none"> Provide curated information that is easy for the customer Increase itineraries + top lists of things to do for visitors Enhance cross-promotion between operators in-region Increase PC on signature travel itineraries for awareness Ensure key pre-arrival information provision to visitors (eg. pre-booking restaurants, off-season closures)
EXPERIENCING	<ul style="list-style-type: none"> Individual products provide consistent quality service, some above + beyond Views + friendly village vibe provide 'wow' Diverse range of dining experiences Easy transition on arrival into holiday mode 	<ul style="list-style-type: none"> Industry customer service + experience enhancements Industry-wide adoption of region promises + identity to ensure consistent delivery of desired experience Increase in-region comms of opening hours + pre-booking needs to ensure visitor has the best experience Review tour pick-up + accessibility to increase access to the wider destination's top experiences + attractions
REFLECTING	<ul style="list-style-type: none"> High customer connection + sentiment 	<ul style="list-style-type: none"> Create an intentional social media plan that leverages visitor content + sentiment to influence earlier stages of the journey Enhance region farewell with an invitation to come back + to keep in touch Foster a social media community, where visitors share stories + maintain their connection to the region beyond their stay Post-departure comms to maintain connection with customer + remain top of mind for repeat visits + referrals

PALM COVE - FROM GOOD TO GREAT

The strategic question to be considered in moving the region forward with collective action is: 'How could Sophisticated Simplicity be brought to life at each of the Customer Journey stages?'

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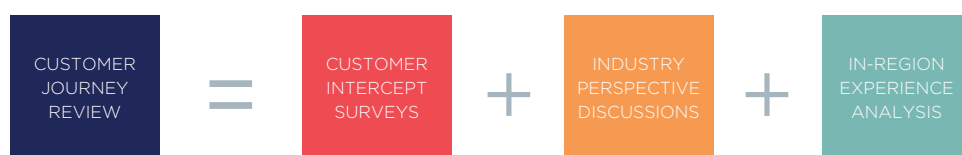
Introduction

Following the creation of a clear, compelling sub-region Identity for Palm Cove, Tourism Tropical North Queensland (TTNQ) + Tourism Palm Cove (TPC) commissioned a program of work to **understand the customer journey + customer experience** of the Palm Cove region.

Going well beyond ‘mystery shopping’, this process empowers stakeholders with a new level of alignment, focus + attention around a common goal – **putting the customer at the heart of everything you do**. This report synthesises + summarises the findings from the Customer Journey Review of the Palm Cove region undertaken by Customer Frame on behalf of TTNQ + TPC in March 2022, informing the industry action planning session for improving the existing experience.

What is a Customer Journey Review?

The Review helps businesses + regions to **think like their customer**, seeing operational delivery from the customer view. A series of **three integrated activities** were undertaken to reveal the opinions + perspectives of customers, industry + an expert third party review.



So much of a customer’s **perceived experience** is influenced by a range of factors in the **actual experience** across their **entire travel journey**. The role of the Review is to reveal elements + influencing factors that drive customer choice, sentiment + likelihood to return.

It is a focused diagnostic + improvement tool to help businesses + regions reframe their existing operations through the eyes of their customers. In summary, it:

- breaks the ‘sacred cows’ by actually walking the walk
- reframes what you see through their eyes, leading to enhanced efficiency + effectiveness
- delivers a structured way of identifying + prioritising improvement efforts.

REVIEW ACTIVITY SCOPE + THE FIVE STAGES OF TRAVEL

The Review examines a range of critical points based on set customer profiles, starting well before face-to-face customer service level interactions + ending well beyond them, based on the Five Stages of Travel (see Appendix). The following table outlines the wider range of review activities + **which elements were in scope for this review**. Items in red were out of scope, those in orange partial coverage, with elements in green completed within scope. As such, the findings of this review should be **considered in the context** of the broader analysis landscape.

DREAMING	PLANNING	BOOKING	EXPERIENCING	REFLECTING
Media analysis	Influencers research	Industry website audits	Customer surveys	Sentiment analysis
Travel search analysis	Travel search review	Travel agent / booking share audits	Intercept interviews	Reviews analysis
Search trends	Desktop search	Desktop web search	Onsite audits	Social media analysis
Personal comments on triggers	Personal comments on pre-trip planning	Personal comments on booking process	Industry interviews	Personal comments on reflecting stage
			Personal comments on experience	

A summary of the methodology used + activities undertaken are contained in the Appendix.

Stage 1 of 5: Dreaming

Customers look for inspiration to help them fulfil a need. Use ideas, imagery, reviews + stories to enrich their decision-making process + leave them inspired.

SNAPSHOT

- **Extensive marketing + promotional activity** is undertaken annually by Tourism Tropical North Queensland + Tourism Palm Cove to drive awareness + visitation to the region as a whole, including national seasonal marketing campaigns covering multi-channels to market
- Campaign **partners** include retail + member partnerships, NewsCorp, free to air + digital media, social media influencers + retail partners eg. Flight Centre
- Campaign **channels** include television, digital, social media, out-of-home + editorial
- Palm Cove **performs exceptionally well** in searches against destinations like Byron Bay + Noosa who achieve more than five times the number of visitors (see Appendix)
- Palm Cove **features in a range of famils** to Cairns + Great Barrier Reef region + received extensive media exposure as a result



CUSTOMER INSIGHTS

- Holidays **start with a trigger**. For couples interviewed, it was a honeymoon, anniversary or to reconnect with each other; for families, it was to disconnect from busy family life, or for a milestone birthday
- Customers are enticed to the region **through deals** via a variety of channels – primarily social media feeds + tourism promos. For some, these ‘deals’ put Palm Cove into their awareness set, having little to no knowledge that it existed prior to sighting the promotion
- Palm Cove is considered a **good overseas alternative** + a low risk COVID holiday option, with easy flight access for special occasions such as honeymoons, anniversaries + family breaks
- Competing with international destinations such as Fiji, Singapore, Japan + Hawaii, known for **high standards** of customer service, inclusive packages + tropical holiday appeal
- When using a travel agent, interviewees instigated the conversation with the agent about Palm Cove, highlighting an opportunity for **greater agent + industry awareness** + connection
- Customers are time poor + prefer **simple packaged options** that make it easy to find, choose + book a holiday experience. Organised bundles with inclusions allow them to relax without having to continually put their hands in their pockets, + they are willing to pay for this benefit
- Whilst deals capture attention, **recommendations from friends + family** have great influence
- Visitors express the view that Palm Cove comes across as somewhere to visit or pop into, not necessarily somewhere to stay or spend any considerable time. This viewpoint changes **once they have visited** the village, but it is an important perception to note.

INDUSTRY PERSPECTIVES

- Industry feedback reflects an appreciation of the work undertaken by TTNQ on behalf of Palm Cove + a **desire to work more closely together** to further raise their profile + exposure
- Many operators reflected the findings that visitors have a **high propensity to return** to Palm Cove once they’ve visited, + a high level of advocacy in recommending the region to others

- Interestingly, whilst customers expressed a desire for packages or easy-to-buy holiday options, industry tend to **view the elements individually** + in isolation from each other
- In all conversations, a level of **region pride was demonstrated** by the industry delegates, with each describing the unique aspects of Palm Cove, very much in line with the new Identity. Terms such as 'island life on the mainland', 'hidden gem' + 'subtle sophistication' were used
- Industry perceive that Palm Cove doesn't 'show up' as much as competing destinations like Whitsundays, Cairns + Port Douglas + that it should have **more prominence** in marketing

REVIEWER OBSERVATIONS

- Crucial stage of the customer journey where destinations must be present to **be considered** + where big opportunities lie for Palm Cove
- Dependent on search terms, Palm Cove has varying **levels of presence**, sometimes standing alone, other times under the wider region umbrella + on occasion, not visible at all
- **Individual products have strong presence**, often independent of the destination
- Huge opportunity to establish clear market position against **traditional overseas destinations**
- Domestic destinations like Broome, Perth + Darwin are considered by customers as **unique, luxurious, compelling** places to visit + alternatives to overseas destinations in COVID times
- It is important to understand the **customer trigger** that initiates the travel journey, to ensure the region meets customer expectations + requirements to deliver a truly great experience
- Further, there is an opportunity to identify the key trigger moments for target customers + provide **inspiration + information** to address these needs in the early journey stages
- Bundled offers (hotel, flight, experiences packages) + itineraries make it **easy for the customer** to move through planning + booking. Though, many customers prefer to unbundle + book elements directly, these **packages provide useful inspiration** + region highlights
- **High level of advocacy**, word-of-mouth + repeat visitation by those who have visited before.

RECOMMENDATIONS

- Ensure Palm Cove (PC) is present on high volume travel sites + those aligned with the brand identity + key customer targets, to maximise awareness + engagement
- Invest further in SEO, PPC + Google AdWords to ensure PC appears in top searches
- Craft content that inspires key target markets, highlighting experience over product
- Ensure Palm Cove is featured in regional itineraries to showcase + differentiate
- Get PC into more 'listicles' + 'must-do' articles of key brands/titles aligned with PC audience
- Drive media value of content to build + maintain position against competitor destinations
- Ensure PC has a clearly defined position alongside neighbouring regions of Port Douglas, Daintree + Cairns to capture ideal customer audience + create wider region appeal
- Curate information to make it easy for key target markets to find, research + book PC, presenting options on dedicated areas of PC website relevant to each market
- Position PC as the place for corporate events + retreats to widen appeal + drive visitation

PRIORITIES FOR THE DREAMING STAGE

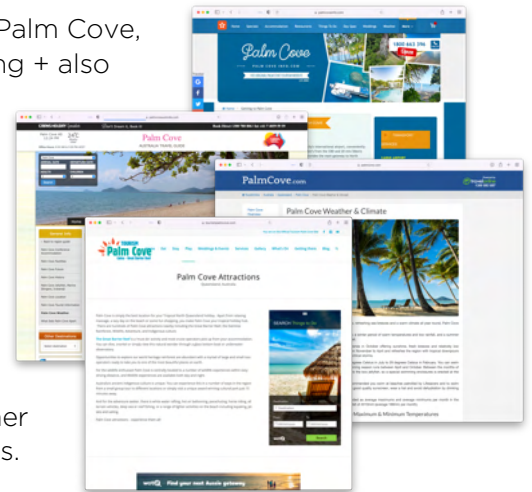
- Greater inclusion of Palm Cove on high volume sites
- Website ranking + site experience to drive more traffic for specific terms relevant to key customer groups
- Shift from a product to an experience focus to enhance customer experience + perception of the region
- More regional itineraries to include Palm Cove

Stage 2 of 5: Planning

Customers are looking for cold hard facts + details. Provide information in easily digestible formats. Curation is key in this phase.

SNAPSHOT

- A range of supporting content + **planning tools exist** for Palm Cove, nested within the wider Cairns + Great Barrier Reef offering + also spread across individual operator sites
- Customers indicate a clear propensity to 'plan the basics' ahead of time, with other activities planned + **organised when in region**, with packages seen to make planning easier
- Industry feedback suggests that **more coordination** + consistency of information across the operator landscape will enable the region to reach its potential
- Opportunities exist to build **deeper relationships** with intermediaries (travel agents, adjacent operators) to further elevate Palm Cove in their recommendations to customers.



CUSTOMER INSIGHTS

- Beyond flights, accommodation + transfers/car hire, interviewees **do not plan their holiday in-depth before arrival**. Comfortable with a general knowledge of what there was to see + do, the need to not over-book themselves + weather contingencies were the main reasons
- Awareness of Palm Cove varies, with some **'discovering' Palm Cove** through deals online + others having visited before or received personal recommendations from friends + family
- **Packages are seen as highly attractive**, particularly by affluent couples who look for ease, value + luxury when searching for holiday options that suit their needs
- The proposition of **adult-only product** is highly attractive to affluent couples, who perceive it as an option usually reserved for international destinations
- Young Family customers, who desire a balanced holiday of family activity with adult RnR, believe there is **limited information available on travelling with children** in Palm Cove
- Contrary to traditional theory, the **male partner** (Affluent Couples, 8/10) owned the Planning + Booking stages, researching accommodation + tour options, liaising with operators + booking. The female, whilst consulted, had little involvement in the administrative side.
- Customers appear relaxed in this stage, with an **abundance of information** available online + in many cases, the **hotel concierge providing trusted information + recommendations** prior to arrival + whilst in-region.

INDUSTRY PERSPECTIVES

- Individual operators (accommodation), provide information to customers prior to arrival + in-region based on personal views, with **little consistency or coordination** on a region level
- Industry consistently speak of Palm Cove as a **'travel hub'** to experience the wider region
- A shared view that industry does not yet have a **consistent, clear understanding** of who Palm Cove is or what makes it special as a holiday destination, is evident + an opportunity.

REVIEWER OBSERVATIONS

- In this critical stage, the customer has decided to take a holiday + is now researching *where* to go. Open to possibility, they search for deals + options that meet their needs, consulting friends + family, online forums, review sites + online travel agents + booking sites
- Consideration of Palm Cove + Port Douglas + which best suited our needs was at times unclear + answered by user-generated content, presenting an opportunity to **match region offerings with customer needs** to enhance their experience + encourage repeat visitation
- In searching things to do IN Palm Cove, results list things to do FROM Palm Cove, with little to no content on the village, restaurants or events, which **tailored information** could address
- The emergence of the male as the planner/booker has significant implications for how information + **content is presented** + the channels used to reach the decision maker
- Palm Cove could be positioned as a luxurious, **adult only destination** with dedicated product, rivalling international destinations through its ease of access, COVID safety + affordability
- Provision of **family friendly information** in the Planning Stage would address Young Family needs + concerns + encourage them to book their ideal adult/child holiday in Palm Cove.

RECOMMENDATIONS

- Launch + communicate new Identity to industry to maximise consistency + engagement
- Refresh Palm Cove website to provide a one-stop shop, from events, FAQs + itineraries, in a sophisticated, simple format – by customer group for relevance + cut-through
- Increase Palm Cove content on TTNQ website + showcase its uniqueness from other regions
- Create + maintain a strong social media presence with a balance of information + inspiration, including listicles, events, videos, local secrets, FAQs, stories, imagery + unique experiences
- Invest in SEO health, PPC + Google AdWords to ensure PC appears in searches + the 'People also ask' section, based on needs + search trends
- Review + improve profile + presence on key travel intermediaries' websites + itineraries
- Create an engagement program for key travel agents to drive awareness + connection
- Ensure crucial information such as travel times, seasonality, opening hours + services are available in one place to make researching as easy as possible
- Create annual calendars + content to educate customers on best times to visit, including weather + annual events (eg Reef Feast) for best experience
- Work with trusted sources + partners to elevate the right messaging about PC to the top of searches for affluent couples, families + corporate events
- Identify top customer questions by customer group (affluent couples/families/corporates) + develop curated content to address them, helping overcome any objections they might have
- For corporates, create itineraries based on 2, 3 + 5 day visits highlighting the core experiences of PC + the wider region, based on interest themes, to be shared pre-trip
- Provide essential family travel information such as babysitting + hire services, kid's activities + events, playgrounds etc to alleviate parental stress + worry
- Create fact sheets + 'frequently asked questions' + make available on Palm Cove + key partner websites
- Promote Palm Cove as the ideal international destination alternative for adult-only holidays

PRIORITIES FOR THE PLANNING STAGE

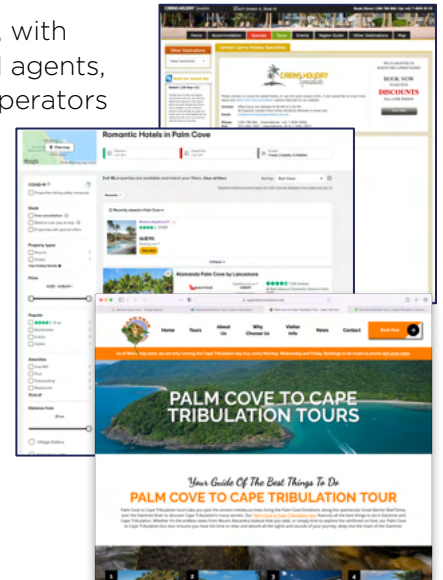
- Clearer Brand Identity + consistency, in line with new Identity
- A more comprehensive local website with local secrets
- Increase Palm Cove content on TTNQ website
- A stronger social media approach to increase presence on key platforms + create a community of advocates
- Improve profile + presence on travel intermediaries' sites
- Enhance travel agent awareness + connection to region

Stage 3 of 5: Booking

Customers want to know that they have made the right decision. Allay these doubts with stories + testimonials. Turning their anxiety into excitement is your primary purpose.

SNAPSHOT

- A wide **range of booking channels** are available to customers, with Palm Cove being widely accessible through mainstream travel agents, online travel sites + direct booking platforms with individual operators
- Customers (potentially through lack of knowledge) either book their travel basics (leaving it until in-region) or enjoy the **ease of packaged options** to simplify this part of their journey
- An opportunity exists to **drive intermediary sales** both through partnerships + collaborations with complimentary offerings, driving lateral revenue growth for Palm Cove + CGBR operators
- Opportunities exist to **build deeper relationships** with travel agents to further elevate Palm Cove in their recommendations to customers + early booking revenues.



CUSTOMER INSIGHTS

- The majority (16/18 interviewees) booked their holiday elements **direct with operators**, with the remaining booking through their own travel agent chains (as travel agents)
- Interviewees pre-book few (if any) activities or experiences **before their arrival** in the region, preferring to make decisions in the moment over locking themselves into set or rigid plans
- There is a silent assumption that **it will 'be okay'** to book when they arrive + that there will be no problem with availability. Perhaps related to 'back home', where access to restaurants + experiences on-demand is plentiful, customers can be left disappointed + surprised in-region
- Not averse to pre-booking, customers would book must-do elements, including experiences + restaurants, if they were **made aware of limited availability** beforehand
- Interviewees express **relative ease in booking**, many relating to having visited before or having found an offer or package that made it easy for them to combine + book elements
- A trend towards males managing the holiday booking is evident, indicating the need to review information provision + booking processes to **cater for their needs**
- Customers are happy to **pay extra for services** such as Palm Cove pickup on day tours that they wish to go on, or alternatively, hire a car to access those products on their desire list
- Young Family travellers, despite their relative affluence, prefer to **prioritise their holiday budget** for activities + experiences over higher-level or costly accommodation

INDUSTRY PERSPECTIVES

- Select operators **provide curated information** to assist their customers, from advice on pre-booking restaurants to suggested itineraries, day trips, tours + attractions, at time of booking
- Respondents suggest the development of **'welcome to' content** (text message, short video, website, PDF factsheets) to share pre-arrival, driving consistency in messaging + increasing the touch points with visitors to inspire them + drive more retail sales + bookings

REVIEWER OBSERVATIONS

- In this important stage, the customer decides on a destination + books their holiday
- There is some inconsistency + confusion experienced in this stage, with considerable **effort required** to find information across a wide range of disparate sites + sources
- With no one travel agent chain or brand appearing to 'own' or specialise in Palm Cove, the **onus is on the customer** to search the best deals, itineraries + advice from numerous sources
- When following 'top lists' (eg. Top 10 coolest Palm Cove Hotels), the breadcrumb trail to Palm Cove **would sometimes get lost** amongst neighbouring destinations, causing confusion
- Information + booking sites including local tourist booking sites **can overwhelm** with the amount + format of information provided, resulting in buyer's overwhelm + inaction
- Booking day tours + experiences with **collection from Palm Cove** was restricted + often difficult to navigate as to who collects from Palm Cove + at what additional cost + availability
- Inconsistency across operators in their propensity to recommend + book in-region activities can contribute to customer confusion, inaction + disappointment, with clarity needed as to **where customers can access this support** if they require it (eg. hotel concierge services).

RECOMMENDATIONS

- Compile + curate product options for each of the key destination experiences (reef, rainforest etc) presented in a table for easy comparison + analysis by the customer
- Increase presence of Palm Cove (PC) product in key industry intermediaries, especially trade where bookings are made, to maximise awareness + generate bookings
- Encourage industry collaboration, packaging + cross-promotion to enhance offerings
- Identify + target key partners + titles to ensure Palm Cove presence in itineraries/stories
- Ensure PC appears on key Google search terms such as 'best hotels', 'romantic', 'couples' etc.
- Operators to consider a concierge service to customers them make the most of their time in-region by increasing awareness of + booking product on their behalf
- Create a flow chart process that through a series of questions, leads the customer to the right experience + product for them, available as a tool on the Palm Cove website
- Provide advice + up-to-date information on travelling with children of different ages, including apartments, car hire, babysitting services, kid's clubs, kid-friendly restaurants, best value family meals, children's entertainment etc. to ensure parents have the best experience
- Curate product options + itineraries for families based on age of children + appropriateness of each experience for ease of decision making
- Ensure there is a place on the PC website dedicated to booking engines or channels for corporate event planners to make it easy to book with itineraries, tips + FAQs

PRIORITIES FOR THE BOOKING STAGE

- Provide curated information that is easy for the customer
- Increase itineraries + top lists of things to do for visitors
- Enhance cross-promotion between operators in-region
- Increase PC on signature travel itineraries for awareness
- Ensure key pre-arrival information provision to visitors (eg. pre-booking restaurants, off-season closures)

Stage 4 of 5: Experiencing

Customers connect with people + places that deliver unique + memorable experiences. Grow this relationship with your own local stories + secrets.

SNAPSHOT

- When in region, Palm Cove delivers **at or above the expected** experience, delivering a unique 'connection' that builds a foundation for repeat visitation + advocacy
- The role of the accommodation provider (front of house or concierge) is **paramount to influencing the overall customer experience**, providing valuable local knowledge + insight
- Customer **service levels vary** across the operator landscape, from exceptional to disconnected, with the service inconsistency detracting from the overall experience
- An opportunity exists to **drive consistency** in the 'Welcome to Palm Cove' across the industry, whilst giving customers easy access to curated information as they need it.



CUSTOMER INSIGHTS

- Once customers 'find' Palm Cove, they **connect with the laid back coastal vibe**, ease of being able to walk everywhere + the quality + variety of the dining options
- Customers have their **expectations met or exceeded by Palm Cove**, with a high level of advocacy + a strong intent to return to the region in the future (17/18 interviewees)
- Visitors love Palm Cove + leave with a **connection to the people, the vibe, the village**, all but one telling us they loved it, that it was everything they hoped for + their perfect place
- Expectations of customer service, restaurant quality, opening hours, availability of choice + range are high + are **compared to those of 'home'** + this is where Palm Cove fell short
- There is a **heavy reliance** on hotel concierges + reception staff to inform + recommend the best things to do in the region, a service highly valued + regarded by visitors
- Despite easy access to mobile information, **physical brochures are still valued by visitors**
- Visitors love that they can **leave the car + walk** everywhere, that everything is accessible
- Affluent visitors have an expectation that holiday dining will be **as good or better** than home
- Customers expressed their disappointment at the **availability of restaurants**, as well as the service + quality of the food – their expectations simply were not met in many cases
- Family visitors expressed a desire for **access to 'kids club' + babysitting** style activities, similar to offerings in island locations (cited Fiji, Hamilton Island). If such services were available, there is a high willingness to pay, + it would be a clear differentiator for the region
- Family visitors mentioned the **usual family chores** that must be tended to on holidays. Services that make their lives easier, such as meal delivery or washing services are of value
- Compared to international destinations like Fiji, Singapore, Japan + Hawaii, known for high **standards of customer service**, visitors believe quality + service are notable gaps here

INDUSTRY PERSPECTIVES

- There is a shared view that customers are **seeking local knowledge** when they arrive + that many don't come armed with it. From the best places to eat, to the best walks to do – customers are often engaged in conversations with operators to get the local insight + knowledge. There is an acknowledgement that this **information provision** is done on an individual basis, without a concerted effort across the operator landscape, leading to highly variable customer experiences
- Visitors have a lack of understanding for **distances/time** it takes to move around the region
- Consistent belief that the **existing PC website could be updated** + be more interactive
- Operators consistently experience customer's disappointment at the availability of restaurants, hire cars + other experiences they **did not realise required pre-booking** – customers seem to expect that they will 'just be there' in the region when they arrive
- Respondents indicate a concern that without innovation, PC could be perceived as a 'one + done' destination as opposed to a **vibrant, changing community worthy of return**. They imply an apathy across restaurants, events, accommodation providers + entertainment venues
- The opportunity to pull through **more region-specific, diverse + memorable experiences** across these sectors could create the 'wow' factor in customer experience of Palm Cove
- Shared acknowledgement of **increasing customer expectations** + the need to meet or exceed these, in the face of service/product quality challenges due to staff shortages + COVID
- A disconnect between restaurants + accommodation was mentioned as a big challenge to providing the best customer experience possible with **better communication needed**

REVIEWER OBSERVATIONS

- In the Experiencing Stage, the customer is here, in-region, experiencing the destination
- Delivering on promises made through marketing + communications is crucial in this stage
- **Overall experience of Palm Cove is magical**, living up to the expectations built throughout the early stages of the journey + in many cases, well exceeding expectations
- From the **village vibe, warm welcome + friendly locals** to the stunning tree-lined esplanade + the range of restaurants + accommodation styles, Palm Cove delivers
- Customer service + experience at **Reef House was world-class**, with exceptional customer service, unique (included) activities + a concierge service for recommendations + bookings
- Inconsistencies in customer service, food quality, restaurant availability + customer experience require attention, as they pose a risk to Palm Cove's **position as a foodie heaven**
- As high-ranking, flagship venues featured in the 'top' lists in Google, many did not deliver to expectation, resulting in disappointment + a **poor perception** of value, service + experience
- An opportunity exists for industry to **share information** such as restaurant hours, seasonal closures + availability to ensure the best possible customer experience of guests in-region
- There is an opportunity to enhance the **Family visitor's experience** with information provision on kids' clubs, babysitting, family-friendly experiences + affordable dining to make life easy
- This cohort is hard marking on their experiences, but they are **willing to pay for quality** + to own this space, the region must deliver consistently + to a high standard

RECOMMENDATIONS

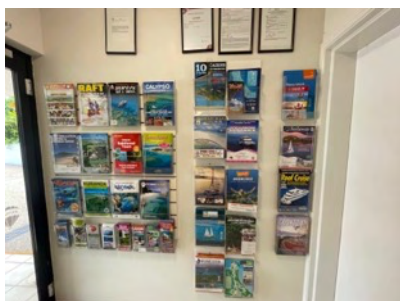
- Enhance industry engagement + understanding of customer service + experience needs to drive improvements across the region, including the new region Identity
- Encourage PC operators to cross-promote each other to enrich + widen the customer experience of the region
- Facilitate the sharing of crucial customer information such as opening hours, closures, peak periods, booking availability etc between restaurants + accommodation
- Continue to improve region access to signature, quality tours + experiences to ensure the visitor has the best experience possible
- Encourage restaurants + accommodation providers to work closely together to improve communication, drive business + improve the customer experience
- Engineer 'delight moments' in the customer experience by identifying the critical moments that provide the greatest impact on their perception of PC
- Ensure 'top' lists are truly reflective of the best products + experiences available in-region to avoid customer disappointment + disconnection
- Provide curated lists such as 'our locals love', 'our favourites', 'places not to miss', 'local secrets' in accommodation houses to inspire + excite customers
- Enrich the perception of a unique experience through the use of local products that help tell the region's story + create a point of difference
- Provide tips + reviews on Palm Cove website from families for families (+ couples for couples) to give real-life examples of how they've had the best experiences of the region
- Invite event organisers to share their experiences of the destination, what they loved + appreciated, to share with other potential customers
- Undertake customer surveys to better understand what they love / don't love about the PC experience to create improvement plans + actions

PRIORITIES FOR THE EXPERIENCING STAGE

- Industry customer service + experience enhancements
- Industry-wide adoption of region promises + identity to ensure consistent delivery of desired experience
- Increase in-region comms of opening hours + pre-booking needs to ensure visitor has the best experience
- Review tour pick-up + accessibility to increase access to the wider destination's top experiences + attraction

SPECIAL NOTE: VISITOR INFORMATION

- **Brochures are not dead:** Whilst visitors have access to information via mobile, they demonstrate an appreciation for local knowledge + the opportunity to liaise with a human being who is able to curate the information + provide brochures that match their needs. It appears the need for a digital disconnect on holidays is a driver for use of these brochures
- **Accommodation = information centre:** With limited knowledge of the region, customers rely on their accommodation provider for information + guidance on what to do in the region, from restaurants to tours, self-drive day trips to the must see's + do's. As such, accommodation providers (owners, front of house team or hotel concierge) might be seen as de factor Visitor Information Centres + a critical node in the travel journey. In fact, they hold significant influence on the overall experience customers have of Palm Cove + the wider region. For many customers, this was a valued element in their overall stay + appreciated for the local, unbiased information + advice provided. In fact, the majority of visitors (16 out of 18) mentioned their accommodation reception as their key point of information, with none from the sample using a local Visitor Information Centre for region bookings or information
- **The role of Visitor Centres:** With the changing modes of information access (to mobile) + the reliance on hotel concierge/front desk, there is a questionable need for a stand-alone traditional-style Visitor Centre. Whilst there is a definitive need for visitor information provision in-region (many visitors are not planning their activities prior to arrival), the format + function of this information provision must be tailored to visitor needs + preferences, to support their entire travel journey. The outcomes of this review have demonstrated that target customer groups' information needs are primarily being met well in-region by existing services + that customer propensity to engage with a Visitor Centre would provide marginal gains. The opportunity for Palm Cove is to formalise their visitor servicing approach to bring consistency + greater effectiveness to drive visitor engagement + spend.



Example images: A-Frames, sales boards, pamphlets + signs are dotted around Palm Cove.

Stage 5 of 5: Reflecting

Customers search for post-holiday gratification by telling the world about their experiences + connections. Listen, learn + utilise these insights to take their experiences to the next level.

SNAPSHOT

- Customer sentiment + advocacy is perceived to be **a strength for the region**, with an overwhelming majority of customers indicating that they would return again
- Aside from feedback surveys post-trip, it is acknowledged that **more can be done by industry** to reinforce, continue + maintain the connection with customers
- This is consistent in regions throughout Australia + poses a great opportunity for the Palm Cove industry to **retain the right customers** + build a fan base for ongoing resilience
- Some operators are doing this stage well + there is a **collaborative opportunity** for the industry to learn best practice from each other.

CUSTOMER INSIGHTS

- Little mention was given by the customer as to their experience once leaving a holiday destination or what matters to them in this stage
- That said, many of the customers intercepted had visited the region before + were repeat visitors. It was not clear whether their return was **driven by invitation or by the connection** + sentiment they have developed for Palm Cove as a result of their experiences in-region.

INDUSTRY PERSPECTIVES

- Currently there appears to be very **little consideration** given by industry to the Reflecting stage, that is, after the visitor has left the destination for home
- Aside from one operator, the majority of industry players do not invest time or energy in this stage, aside from the odd **customer feedback survey**.

REVIEWER OBSERVATIONS

- The Reflecting Stage commonly receives the least attention of all the stages + is often forgotten. As human beings, we can be quite transactional in nature + once a customer has left our premises, we **move on to the next** transaction + the next customer
- Aside from a few post-visit surveys, there was **no communication** from the region post-trip in this Experience Review
- This stage is **one of great possibility**, of connection, of reaffirming all the wonderful things we did for the customer during their stay with us, but this goodwill is commonly wasted + lost
- There is a **huge opportunity** to re-create + reaffirm the customer relationship + the goodwill built up over the period of their stay in Palm Cove
- Specific operators however, are doing things as part of their **'send-off' process** eg. Reef House letter of thanks + thoughtful gift that reinforces the brand experience of not only their own property, but of Palm Cove as a region.



RECOMMENDATIONS

- Create a social media plan that traverses the entire customer experience journey, using the sentiment + stories of existing visitors to drive interest + demand for new visitors
- Encourage visitors to share their experiences on social media (using hashtags) + review sites
- Create reasons to continue to engage with Palm Cove via social media through competitions + e-newsletters to extend + maintain the relationship (Instagram would work well here)
- Encourage visitors to create stories of their PC experience to share on the PC website + social media to build a community
- Create a region thank you message to thank the visitor for choosing Palm Cove
- Encourage operators to ask for feedback + reviews + to share these with the wider industry to raise experience quality + inform improvement plans
- Create VFR programs for locals who may have friends interstate, to encourage them to visit + travel together to the region
- Provide special offers + invitations to past customers to encourage repeat visitation + to maintain relationships + connection
- Provide a package of offers + tools for corporate event organisers to encourage booking + to create an engaged community, encourage leisure travel + extend stays post-event.

PRIORITIES FOR THE REFLECTING STAGE

- Create an intentional social media plan that leverages visitor content + sentiment to influence earlier stages of the journey
- Foster a social media community, where visitors share stories + maintain their connection to the region beyond their stay
- Enhance region farewell with an invitation to come back + to keep in touch
- Post-departure comms to maintain connection with customer + remain top of mind for repeat visits + referrals

Recommendations + priority activities

The following table collates the opportunities from the Review. It provides an indicative timeframes + proposes the lead agency responsible in collaboration with industry partners.

PRIORITIES FOR IMPROVEMENT BY JOURNEY STAGE		LEAD	TIMEFRAME		
			SHORT (0-12M)	MEDIUM (12-24M)	LONG (24M +)
1. DREAMING STAGE					
1.1	Greater inclusion of Palm Cove on high volume sites	TPC	■		
1.2	Website ranking + site experience to drive more traffic for specific terms relevant to key customer groups	TPC	■		
1.3	Shift from a product to an experience focus to enhance customer experience + perception of the region	TPC			■
1.4	More regional itineraries to include Palm Cove	TTNQ		■	
2. PLANNING STAGE					
2.1	Clearer Brand Identity + consistency, in line with new Identity	TPC	■		
2.2	A more comprehensive local website with local secrets	TPC		■	
2.3	Increase Palm Cove content on TTNQ website	TTNQ		■	
2.4	A stronger social media approach to increase presence on key platforms + create a community of advocates	TPC	■		
2.5	Improve profile + presence on travel intermediaries' sites	TTNQ		■	
2.6	Enhance travel agent awareness + connection to region	TTNQ		■	
3. BOOKING STAGE					
3.1	Provide curated information that is easy for the customer	TPC	■		
3.2	Increase itineraries + top lists of things to do for visitors	TPC	■		
3.3	Enhance cross-promotion between operators in-region	TPC		■	
3.4	Increase PC on signature travel itineraries for awareness	TTNQ		■	
3.5	Ensure key pre-arrival information provision to visitors (eg. pre-booking restaurants, off-season closures)	TPC	■		
4. EXPERIENCING STAGE					
4.1	Industry customer service + experience enhancements	TPC		■	
4.2	Industry-wide adoption of region promises + identity to ensure consistent delivery of desired experience	TPC	■		
4.3	Increase in-region comms of opening hours + pre-booking needs to ensure visitor has the best experience	TPC	■		
4.4	Review tour pick-up + accessibility to increase access to the wider destination's top experiences + attractions	TTNQ		■	
5. REFLECTING STAGE					
5.1	Create an intentional social media plan that leverages visitor content + sentiment to influence earlier stages of the journey	TPC	■		
5.2	Foster a social media community, where visitors share stories + maintain their connection to the region beyond their stay	TPC	■		
5.3	Enhance region farewell with an invitation to come back + to keep in touch	TPC	■		
5.4	Post-departure comms to maintain connection with customer + remain top of mind for repeat visits + referrals	TPC	■		

It is recommended that a collaborative industry forum/workshop be held to **explore + unpack the required actions** to enact the recommendations above.

Appendix: Methodology summary

The Customer Journey Review consists of a series of **three integrated activities** undertaken in March 2022 to reveal the opinions + perspectives of customers, industry + an expert third party review. The outcomes of each activity are then synthesised + assimilated to provide an overall perspective on the opportunities for improvement for the region.



To inform the Customer Journey Review, review activities were focused on unearthing the perspectives from the **two agreed target customer groups** of midlife affluent couples + young affluent families. The table below provides an overview of each of the three main activities + the approach taken.

ACTIVITY	OBJECTIVES + APPROACH	PROCESS OVERVIEW
CUSTOMER INTERCEPT SURVEYS	<p>Primary objectives for the customer intercepts:</p> <ul style="list-style-type: none"> To gain insights from the visitor's perspective as to their experience of finding, choosing + travelling to Palm Cove as their holiday destination of choice To identify gaps in the customer experience where visitors experience frustration or pain, or lack access to the information they need to make their holiday decisions To identify improvement opportunities across the five stages of travel from the customer's perspective, in line with the Palm Cove Identity of Sophisticated Simplicity <p>Target customers were asked to engage in a semi-structured discussion to unearth their viewpoints + insights on the following topics:</p> <ol style="list-style-type: none"> The primary trigger for their trip, city of origin, travelling party + length of stay Destinations they considered in the dreaming / planning phase + why Palm Cove Where did they go for + how easy was it to find information to support trip planning How much of their trip was planned ahead of time versus at the time (in-region) How well the delivery has met their expectation of the experience 	<p>The discussions were facilitated + moderated by Customer Frame Partners, Peter Turner + Sueanne Carr, both experts in Customer Strategy + Insight methodologies.</p> <p>Customers were provided with a \$20 gift card incentive for their participation post-discussion.</p> <p>Discussions were held in various locations across the wider region between 17 + 22 March 2022.</p> <p>28 Customers across the two primary target groups were intercepted, with 18 interviews successfully completed, at an average of 11 minutes per interview.</p>
INDUSTRY PERSPECTIVE DISCUSSIONS	<p>Primary objectives for the Industry Perspectives:</p> <ul style="list-style-type: none"> To gain the operator's perspective + their perception of the current customer experience versus the new Palm Cove 'Sophisticated Simplicity' Identity To identify gaps in the customer experience (across the five stages of travel) where operators perceive visitors to experience frustration or pain, or lack access to the information they need to make their holiday decisions To identify improvement opportunities across the five stages of travel from the operator's perspective, in line with our new Identity of Sophisticated Simplicity To identify challenges in delivering the Identity core of Sophisticated Simplicity. <p>Nominated industry delegates were asked to engage in a semi-structured discussion to unearth their viewpoints + insights on the following topics:</p> <ol style="list-style-type: none"> What guests need (from operators) to give them the best experience of Palm Cove 	<p>The discussions were facilitated + moderated by Customer Frame Partners, Peter Turner + Sueanne Carr, both experts in Customer Strategy + Insight methodologies.</p> <p>Discussions were held onsite in operator's premises between 17 + 22 March 2022.</p> <p>A total of 7 discussions were conducted, at an average of 23 minutes per interview.</p> <p>Acknowledge + thank the operators who gave their time, provided honest</p>

	<ol style="list-style-type: none"> Most common requests from guests when it comes to experiencing Palm Cove Most common complaints when it comes to staying (e.g. food quality, things to see etc) Where across the Customer Journey do they believe there are gaps Ideas on how to improve the customer experience 	feedback + shared their insights.
IN-REGION EXPERIENCE ANALYSIS	<p>The strategic question set out to answer is: How well does the experience of the Palm Cove region stack up against the needs + expectations of the customer's journey?</p> <p>The answer to this is to step into the customer's shoes + experience the region as they would. The method is based on the Five Stages of Travel, each viewed through the four customer sensory lenses (do, see, hear, think + feel). The Experience Analysis examines 20 critical points (5x4) of information, starting well before face-to-face customer service level interactions + ending well beyond them. These 20 'Experience Nodes' provide the overall structure for analysing + improving the Customer Experience.</p> <p>This activity sought to emulate what a target customer would actually do in their travel journey, unearthing the elements that are working well + require improvement to make finding, choosing, visiting + advocating for the region.</p> <p>For alignment with the Palm Cove Journey Review, this process was focused on the same two target customer profiles, providing an on-the-ground perspective + opinion on delivery strengths + gaps today. As such, it does not cover all customer types or case scenarios + the results should be considered in this respect.</p>	<p>For this exercise, a five-night, six-day visit was executed between 17 + 22 March, 2022, primarily emulating the Affluent Couple customer profile (see table below).</p> <p>The process commenced on 1 March 2022 with desktop research commencing with the Dreaming stage + concluded on 31 March 2022 with the Reflecting stage of the Five Stages of Travel (overleaf)</p> <p>The review was undertaken personally by Peter Turner + Sueanne Carr, Founding Partners at Customer Frame + experts in Customer Experience Review methodology.</p>

IN REGION EXPERIENCE ANALYSIS ITINERARY

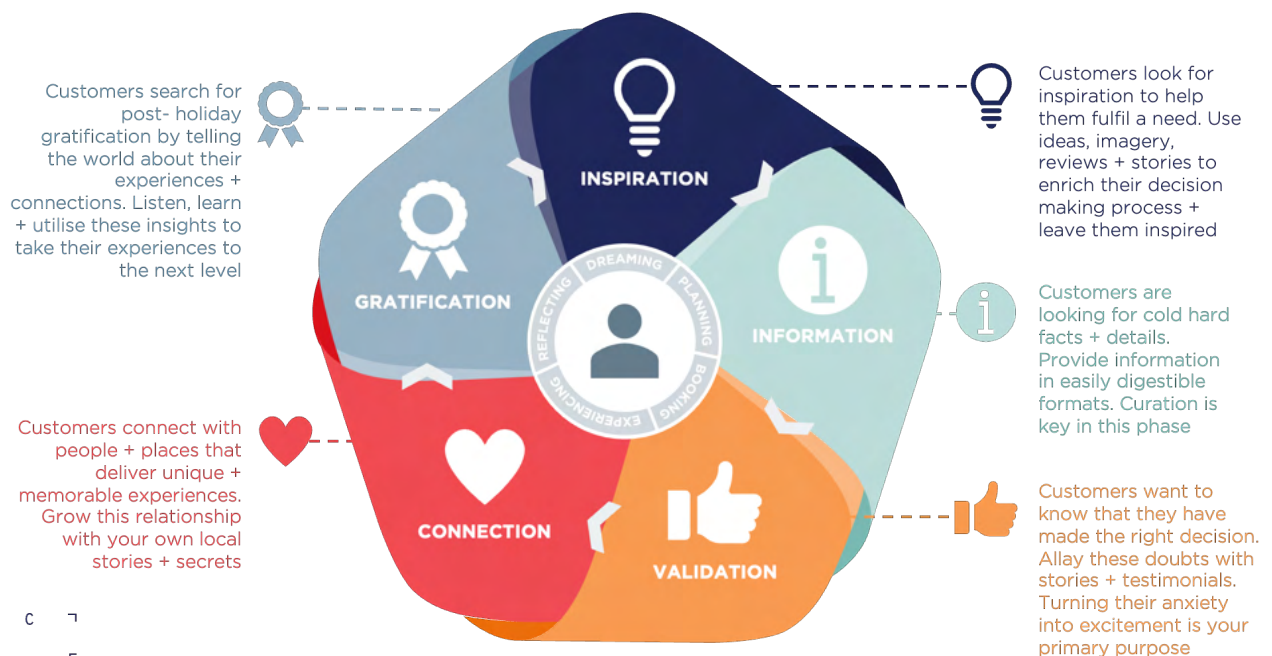
Day	Activity	Detail
Thursday 17 March	Flight	VA 775 BNE CNS 0845 1105
	Transfer	Exemplar Transfers (private transfer)
	Accommodation	Reef House - Ocean View King Suite
	Lunch	Portofino Restaurant
	Dinner	Temple of Tastes, Pullman Palm Cove Sea Temple
Friday 18 March	Car Hire	Palm Cove Car Rental
	Attraction	Hartley's Crocodile Adventures
	Attraction	Wildlife Habitat
	Activity	Cocktail making course, Reef House
	Dinner	Vivo Restaurant, Palm Cove
Saturday 19 March	Breakfast	Reef House
	Day Tour	Sailaway Reef & Island Tours - Outer Reef Tour
	Dinner	Third on the Left Wine Bar El Greko Greek Restaurant
Sunday 20 March	Breakfast	Reef House
	Self-drive trip	Koala Sanctuary, Kuranda BirdWorld Kuranda Kuranda Heritage Markets
	Dinner	Nu Nu Restaurant
Monday 21 March	Tour	Back Country Bliss - River Drift Snorkelling
	Lunch	O'Donnells Irish Bar and Grill, Palm Cove
	Dinner	Reef House with Management
Tuesday 22 March	Breakfast	Reef House
	Meeting	Chill at Portofino
	Morning Tea	27 Degrees
	Lunch	Reef House
	Check out	Reef House
	Transfer	Exemplar Transfers (private transfer)
	Flight	VA 786 CNS BNE 1620 1840

Appendix: CF Five Stages of Travel Model

The Customer Journey Review approach is structured around Google's traditional model of the 5 Stages of Travel (5SOT), but with a twist. By breaking the journey down into the following steps, greater emphasis can be placed on the differing needs + drivers that customers experience at each phase:

- Dreaming
- Planning
- Booking
- Experiencing
- Reflecting*

**The traditional model of 5SOT features 'Sharing' as the final step in the customer journey. We believe sharing is an activity that occurs across the entire journey, while the deeper 'Reflecting' phase occurs after the customer has come home + has significant impact on future decision making, overall sentiment + propensity for advocacy.*



With the advent of digital technology + connectivity, customers are now online at every stage of their journey. This changes the role + importance of traditional information sources such as travel agents, visitor information centres + the printed word such as brochures + maps.

It is crucial that consideration be given to the role of technology, how customers prefer to consume information at each stage of their journey + the huge opportunities available to regions to deliver the very best experience at each journey stage.

Appendix: Intercept Interviewee overview

Three target customer groups were selected as the focus for the Customer Journey Review:

- **Affluent Couples (AC)** - 40-60 year old wealthy couples predominantly living in Melbourne or Sydney (also other capital cities), with or without kids (but travelling without). These customers are predominantly travelling for a couples break, potentially around a special occasion such as a honeymoon, anniversary, milestone birthday or babymoon.
- **Young Families (YF)** - 30-40 year old couples predominantly living in Melbourne or Sydney (also Brisbane, Adelaide, capital cities), travelling with children aged up to 6 to 7 year old. These customers are travelling for a family break with a balance between kid-friendly activities + adult-focused couple experiences.
- **Corporate Event Organisers** - individuals or teams responsible for organising corporate events + retreats for small to medium-sized businesses based in Melbourne, Sydney + Brisbane predominantly, looking for a unique destination to hold workshops, planning sessions + team building retreat style events. (Not in interview sample)

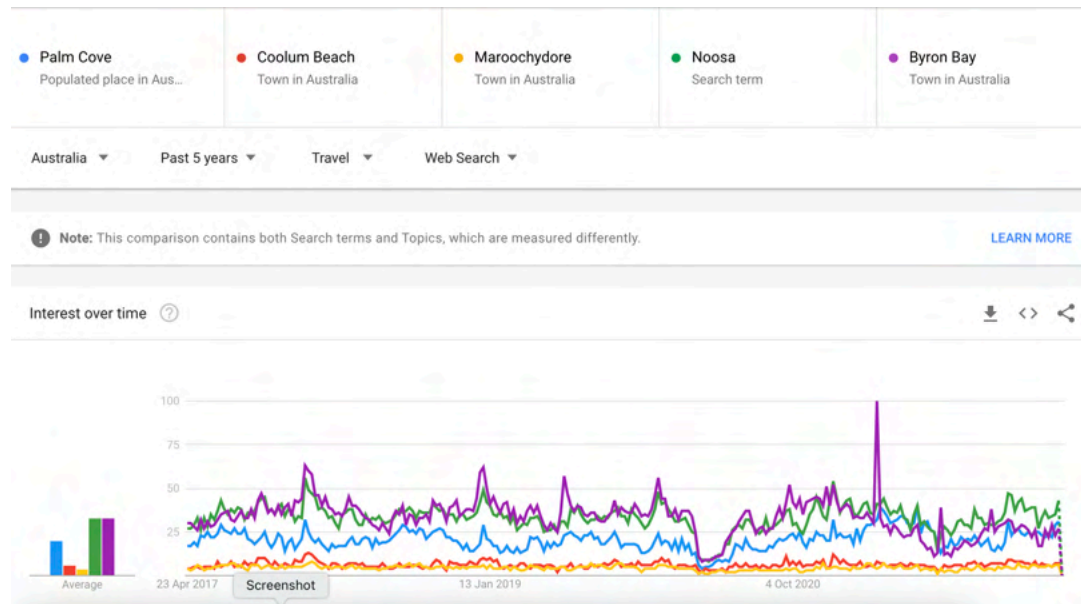
#	INTERCEPT LOCATION	NAME	HOME ORIGIN	PROFILE	STATUS	PLANNED TO VISIT PALM COVE
1	Reef House	Bob + Doris	Mornington, VIC	AC	Repeat	Planned
2	Hartleys	Dennis + Cynthia	Melbourne, VIC	AC	First time	Unplanned
3	Hartleys	Anthea	Melbourne, VIC	YF	First time	Planned
4	Wildlife Habitat	Will + Sally	Hobart, TAS	YF	Repeat	Unplanned
5	Wildlife Habitat	Jordy + Corey	Melbourne, VIC	AC	First time	Unplanned
6	Hartleys	Kylie	Newcastle, NSW	YF	Repeat	Unplanned
7	Hartleys	VFR Family	Brisbane, QLD	YF	First time	Planned
8	Reef House	Steve + Sherry	Melbourne, VIC	AC	Repeat	Planned
9	Reef House	Ben + Laney	Newcastle, NSW	AC	First time	Planned
10	Reef House	Nick + Annie	Melbourne, VIC	AC	First time	Planned
11	Sailaway	Ben + Jenny	Sydney, NSW	AC	First time	Planned
12	Sailaway	Jo + Bob	Sydney, NSW	AC	First time	Planned
13	Sailaway	Blair + Dani	Melbourne, VIC	AC	First time	Unplanned
14	Sailaway	John + Meredith	Adelaide, SA	YF	First time	Planned
15	3 rd on Left	Simone + Jeremy	Melbourne, VIC	AC	First time	Planned
16	Birdworld	Robert	Melbourne, VIC	YF	First time	Planned
17	Palm Cove Beach	Natasha + Michael	Melbourne, VIC	YF	Repeat	Planned
18	Sea Temple	Kelly	Darwin, NT	YF	Repeat	Planned

Appendix: Search + Social Performance

PALM COVE VS COMPETITOR DESTINATIONS

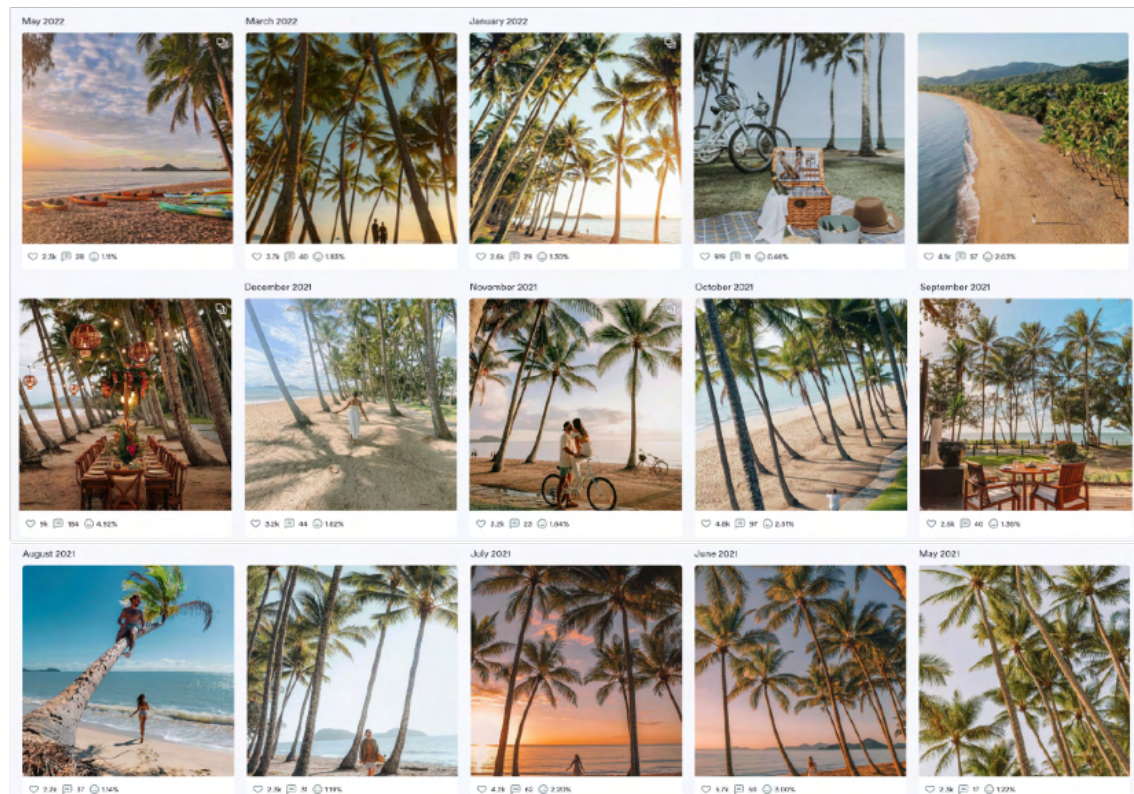
INTEREST OVER TIME

Palm Cove enjoys high search traffic compared to other destinations that have far higher visitor numbers



Source: Google Analytics, supplied by TTNQ

SOCIAL MEDIA + POST PERFORMANCE: PALM COVE - HIGH ENGAGEMENT



Source: Instagram Analytics, supplied by TTNQ

Document control: v24052022

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