



STUDY ON DEVELOPING **MARPI** INTO AN **INTEGRATED TOURISM AREA**

MARCH 2021



FORWARD

In the past, the tourist sites in Marpi, including Banzai Cliff, Suicide Cliff, the Grotto and Bird Island, have had limited upkeep and oversight. Moreover, although geographically located in close proximity, these sites have not benefited from operational or marketing efforts as a combined tourism offering that would increase their overall appeal.

With proper development and management through a Public Private Initiative, Marpi could have the potential to be **transformed into an integrated attraction that could help raise the overall level of tourism offerings for the CNMI as a destination**. In addition, revenue from the establishment of a fee structure for the integrated attraction could be utilized for the much-needed maintenance and upkeep of the area and its natural resources, which are integral parts of the CNMI's heritage.

The recommendations of this study take into consideration the interests of all critical parties, including the community, the public sector, and private investors.

An analysis of Marpi's existing resources has been prepared, highlighting potential opportunities to be explored, and threats that the area faces should the current situation of limited upkeep and unmanaged visitation continue.

To further put issues into perspective and draw upon experience that could help with Marpi's rejuvenation, the study presents case studies on successful tourism attractions which share similar attributes to Marpi and looks at various studies published by organizations such as UNESCO on actively managed natural attractions. The resultant recommendations revolve around the following guiding principle:

To sustainably draw upon Marpi's valuable natural and cultural assets to create a heart warming and enriching experience that visitors will remember their trips to the CNMI by.

Based on the criteria of showcasing the CNMI's natural and cultural assets while managing the potential impacts on the sensitive ecosystem and ensuring that the touristic activities are sustainable in the long run, the re-defined Marpi Integrated Area is recommended to offer the following key components:

- A centralized arrival area and internalized route within Marpi.
- A Visitor Center that promotes the appreciation and preservation of Marpi's natural and cultural resources.
- Better managed diving and snorkeling experiences at the Grotto.
- An improved way to experience Bird Island, leading to more memorable experiences for visitors while actively managing and minimizing the impact on the protected sanctuary.
- A one-of-a-kind trail between Suicide Cliff and Banzai Cliff focused on the treasuring of peace to honor the history of the sites and as a unique attraction.
- A network of raised walkways through a small section of the forest in Marpi to offer visitors a new chance to learn from nature while keeping activities in the protected area low impact.

Developed successfully, the Marpi Integrated Area is envisioned to not only become **a renewed jewel of the CNMI that the community could be proud of, helping to raise its profile in the global tourism arena, but also a financially viable venture that ensures revenue generated from Marpi's precious natural and cultural resources are put back into the maintenance and sustainable preservation of the area.**

Darlana Zhai
March 29, 2021

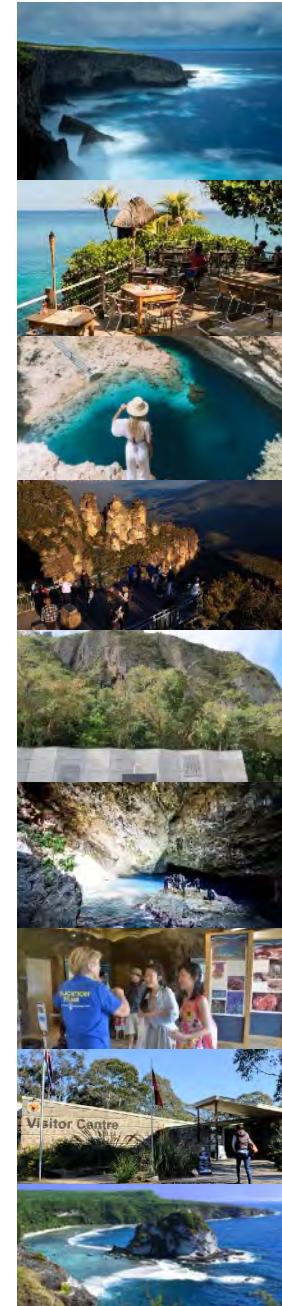


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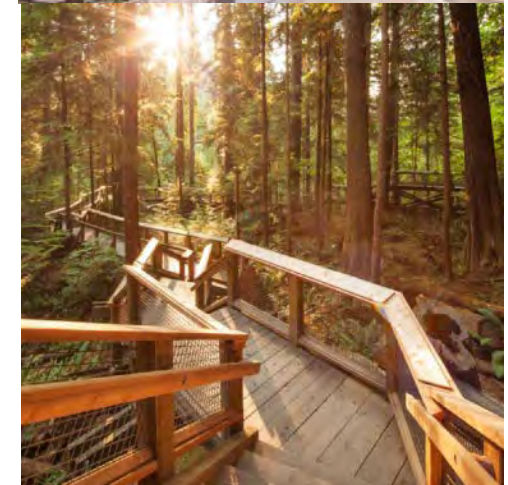
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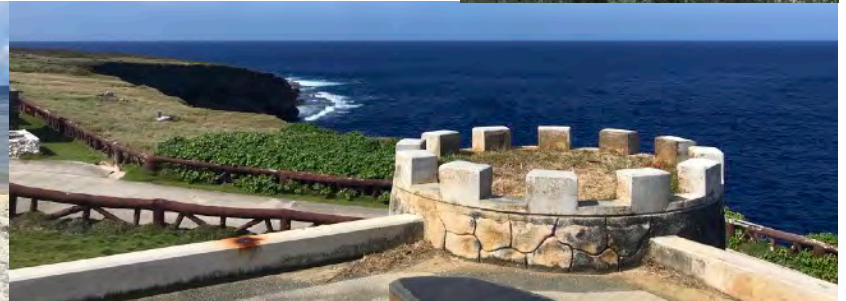
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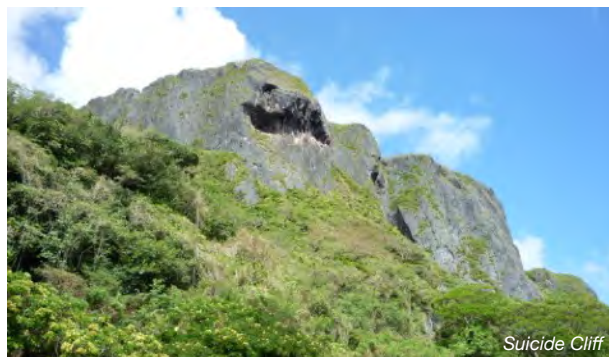
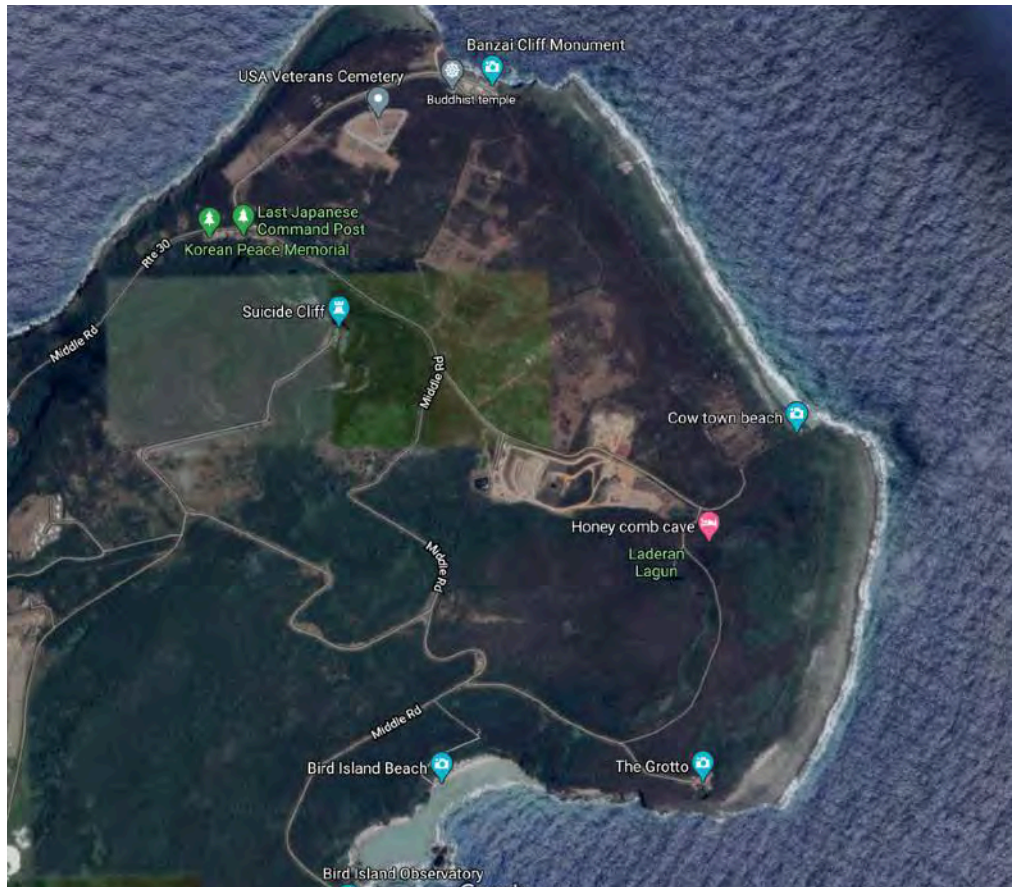


1. ANALYSIS OF MARPI

- ✓ What is available?
 - ✓ Why is it significant?
 - ✓ Past visitation levels?
 - ✓ Opportunities for the future?
1. Banzai Cliff
 2. Bird Island
 3. The Grotto
 4. Suicide Cliff
 5. Last Command Post
 6. Other Natural Resources



LOCATION OF KEY SITES IN MARPI



BANZAI CLIFF

Site of Historic Tragedy

Sitting 100 feet high above the Pacific Ocean, Banzai Cliff marks an indentation off of the coastline. Although appearing majestic and stunning, the story behind how Banzai Cliff acquired its name is one of horror, marking one of twentieth century's most tragic mass suicides.

During the final days of the Second World War, a tragically large number of Japanese and Okinawan civilians jumped off the high sea cliffs, due in no small part to Japanese propaganda that beastified enemy troops and promised afterlife spiritual status as soldiers who died fighting for their country.

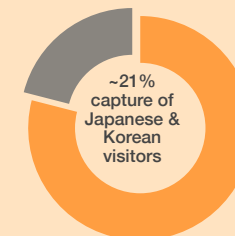
Views More than Historical Content

Of the 208 reviews on TripAdvisor, while many recognized the significance of this site to the Battle of Saipan and the tragedies associated, the majority commented on the site's beautiful scenery and photo worthy views.

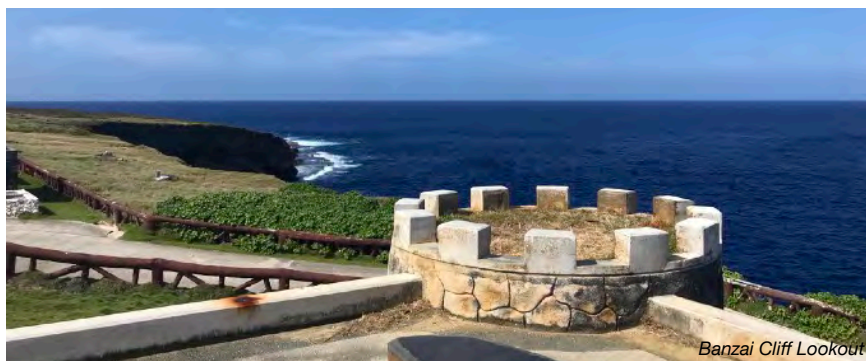
While this is definitely the case, the historical meaning of the site should not be overlooked, particularly its potential to offer a somber and contemplative experience to visitors, highlighting the preciousness of peace. The existing monuments and explanatory plaque, while telling the background of the site, may not be achieving its potential to the fullest extent.

Past Visitation Levels

300 visitors per day



Note: All past visitation levels are based on data collected for 2019.



BIRD ISLAND

A Sanctuary to Birds and Marine Life

Located in a picturesque bay, the tiny, rugged island is separated from Saipan by a fringing reef, a narrow stretch of shallow lagoon with crystal clear water and a lovely white sand beach. The Island is named for the hundreds of birds that nest there, along with many precious species of marine life. Given its delicate ecosystem and the abundance of wildlife, Bird Island is a protected marine sanctuary.

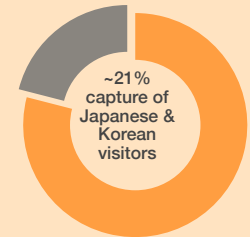
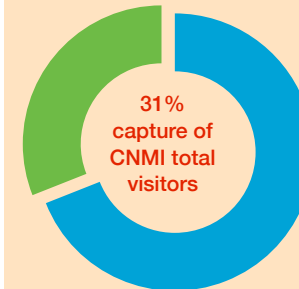
Beauty and Preservation

Based on reviews from tourists, it appears that most visitors view Bird Island from the lookout area just off of the driving route. While the view is most definitely stunning, the experience is greatly enhanced and made more memorable for those to take a hike down to the beach.

While the number of visitors who make it down to the beach has remained low in the past, if facilities are to be developed that would lead to higher visitation levels, it should be based on the premise that the impact on the beach's environment are minimized and limited to within sustainable levels. Along the same lines, While some visitors actually make it onto Bird Island itself from the beach, this may or may not be advisable given the delicate reef and wild life that call this area home.

Past Visitation Levels

339 visitors per day



Note: All past visitation levels are based on data collected for 2019.



Bird Island Beach



Bird Island Sanctuary Signage



View of Bird Island from Beach



View of Bird Island and Beach from Lookout

THE GROTTO

Underwater Wonderland

The Grotto is named one of the world's top cavern dive sites and one of the top attractions in the CNMI. It is a natural sinkhole connected to the ocean by three submerged tunnels. Its indelible variations of blue mesmerizes visitors and is home to a large variety of marine life including sea turtles.

Existing facilities include a viewing platform, pavilion, bathroom, and stairs down to water. As of January 2021, these facilities were being renovated.

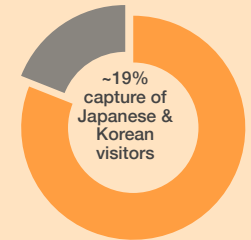
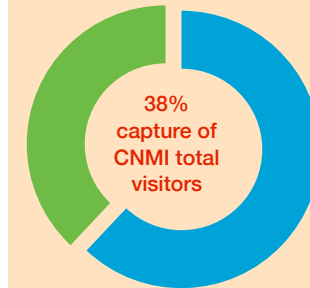
Highest Capture Amongst Marpi Sites

Amongst the four key sites in Marpi, the Grotto recorded the highest number of visitors, averaging more than 400 per day. A large percentage of these visitors came from the Chinese market, showing a capture rate of more than 50 percent.

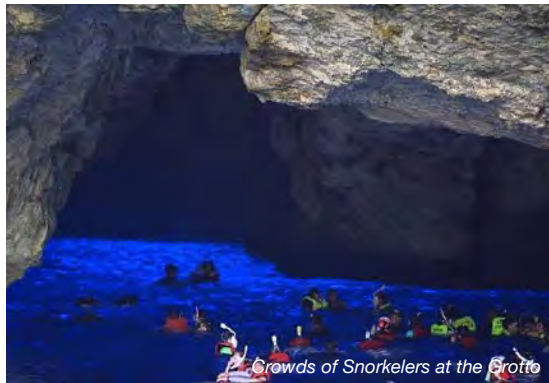
While all visitors rave about the blue waters, there are complaints of crowds of snorkelers focused on taking photos. Another key issue to note is that strong currents and changing tidal conditions could make water activities in the Grotto significantly more dangerous. This may need to be addressed with a more integrated and less tour operator-driven model.

Past Visitation Levels

411 visitors per day



Note: All past visitation levels are based on data collected for 2019.



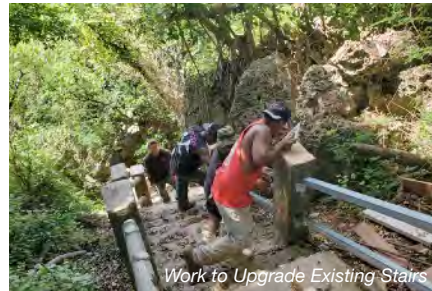
Crowds of Snorkelers at the Grotto



Work to Upgrade Existing Lookout



Work to Upgrade Existing Lookout



Work to Upgrade Existing Stairs



Divers Preparing on the Rocks at the Grotto

SUICIDE CLIFF

A Testament to the Horrors of War

Rising over 800 feet, Suicide Cliff juts out over the relatively flat plains of Marpi. Similar to Banzai Cliff, Suicide Cliff is another site where civilians and soldiers jumped to their deaths rather than surrender at the end of the Battle of Saipan.

The Cliff's edge is speckled with memorials and lookout points offer views of the northern tip of Saipan, an abandoned World War Two airfield, and Banzai Cliff.

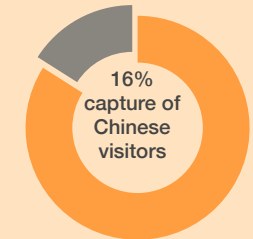
Historical Significance not Optimally Presented

The much lower visitation levels in comparison to Banzai Cliff may be due to the less impressive coastal views offered by Suicide Cliff given its inland location. This shows, once again, that the historical significance of the site may not have been well reflected as part of the current experience.

This appears to be echoed by the online reviews, with many comments such as “not much to see” and “a few memorials and plaques to read”. Few mentioned the experience being “humbling” and “somber” while some expressed the wish for more information to be made available.

Past Visitation Levels

151 visitors per day



Note: All past visitation levels are based on data collected for 2019.



LAST COMMAND POST

Located between Banzai Cliff and Suicide Cliff, the Last Command Post is a reinforced cave constructed by the Japanese military in early 1944. While not the actual last command post where a final all-out counter attack was given, it has several guns and other military equipment on display and is adjacent to more recently constructed memorials, namely the Japanese Peace Memorial and the Korean Memorial.

Given its location that marks the entrance to the Marpi area for traffic approaching from Garapan, this is viewed as a suitable location for the proposed Visitor Center for the Marpi Integrated Area.

In that regard, the area is also lined with many mature trees and offers a beautiful setting ideal for an arrival zone.



Mature Trees at the Last Command Post



Military Equipment Display at the Last Command Post



Japanese Peace Memorial



Route to Banzai Cliff across from the Last Command Post



Mature Trees at the Last Command Post

OTHER NATURAL RESOURCES

Forests in Marpi

Based on environmental studies, the Marpi area is home to the largest amount of surviving native vegetation in Saipan, in a mosaic of native and non-native forest that protects rare native birds. Classified as a tropical dry forest, there are stunning sections of bamboo as well as a unique mix of large trees and ferns that present the perfect landscape for an adventurous stroll.



With that said, given the sensitive ecosystem of the forest as well as it being a protected area, any activities to be hosted in this area should ensure minimal impact on the environment.



SWOT ANALYSIS ON MARPI'S EXISTING RESOURCES

Strengths

- Unparalleled natural beauty in the case of Bird Island and the Grotto.
- Spectacular diving at the Grotto, often mentioned as one of the world's top spots on trusted tourism review sites.
- Unique blend of nature at Bird Island - beautiful water, reef, marine life and birds.
- Significant cultural and historical value in the case of Banzai Cliff and Suicide Cliff - an important part of the CNMI's history as well as great reminders of the cost of peace.
- Location in one concentrated area at the northern tip of Saipan with impressive views.
- Easy existing access.
- Already established as top tourist spots in the CNMI with 300 to 400 visitors per day on average.

Opportunities

- New integrated destination with goal to be sustainable - allow tourists to enjoy the natural and cultural resources while getting revenue essential for the maintenance and upkeep of these resources.
- Add to the CNMI's offerings, potentially applying for status such as UNESCO World Heritage accreditations, which could help put the CNMI further on the world map.
- Revenue that has gone to tour operators in the past could be used towards the maintenance and future development of these resources and ultimately benefit the local community.
- Ensure the proper maintenance and management of these finite resources, preserving the cultural and natural gifts for the future generations of the CNMI's community.

Weaknesses

- Lack of FIT (Free Independent Traveler) friendly tourism facilities and offerings - most people in the past visited as part of group tours partly due to this.
- Dilapidated support facilities, however little is available. The bathroom facility at Banzai Cliff is one example amongst others.
- Lack of maintenance and active restoration efforts which could be more detrimental to the resources as time goes on. These resources are valuable to the CNMI in terms of both its heritage and environment.
- Past revenue benefited independent tourism operators, many of whom may not have reinvested in the area or contributed to its much-needed maintenance.
- Model of depleting and taking from what is available without management efforts to ensure preservation and long term sustainability. This could be particularly detrimental to the ecosystems of the Grotto and Bird Island.
- The cultural significance of Banzai Cliff and Suicide Cliff may not have been represented fully in the context of the CNMI's history and identity.

Threats

- Further depletion of resources - ultimately leading to them becoming less attractive to visitors but also lost to the local community as an integral part of the CNMI's heritage.
- Further unrealized revenue opportunities.
- Potential future decline in visitor capture as repeat patronage for the destination increases over time without the development of activities making second time visits worthwhile. For instance, the leading segment for Marpi presently, China, also has the highest percentage of first time visitors to the CNMI, at 92 percent. If the attractions remain only as check-off-the-list and take-a-photo type of sites, visitation levels are likely to decrease in the future.



2. CASE STUDIES

- ✓ What do they offer?
- ✓ Success factors?
- ✓ Key takeaways?

1. Capilano Bridge Park, Canada
2. Hanauma Bay, United States
3. Cliff of Moher, Ireland
4. Stonehenge, England

CAPILANO SUSPENSION BRIDGE VANCOUVER, CANADA

In 1888, George Grant Mackay built a suspension bridge from hemp ropes and cedar planks across the Capilano River to connect two parts of his summer home property. What began as a 450 feet long and 230 feet high bridge is now one of the top known attractions in Western Canada.

During its earliest days, even on private property, the bridge was popular, and Mackey sold the property in 1892 because there were too many people traipsing through his backyard.



Capilano Bridge in the Old Days
Suspension Bridge
Crossing Capilano River

Having gone through several owners who opened the area to tourists officially, the Capilano Bridge, in its current incarnation of steel cable and cedar planks, was rebuilt in 1956.

Although popular, it remained a stop-off attraction for visitors driving up to North Vancouver / Whistler until early 1990, after Nancy Stibbard became its owner.

By developing a myriad of activities that are closely linked to the nature of the land and bringing in aboriginal culture to augment the attraction's most important but somewhat mono-faceted asset - the suspension bridge, Stibbard transformed Capilano into one of British Columbia's top tourist attractions, commanding a ticket price of CAD 55 and enjoying around 1.2 million visitors per year.



Variety of Activities on Offer in addition to the Bridge

Branching out from the success of the Capilano Bridge Park, the portfolio of Stibbard's Capilano Group has expanded to include two redeveloped historical properties in the Rookie Mountains as well as other tourist concessions in Vancouver.



Capilano Bridge Now

CAPILANO SUSPENSION BRIDGE VANCOUVER, CANADA

Adding Value through Activities

One of the reasons the Capilano Bridge Park remained a mere stop-off attraction until the 1990s is that although the bridge was very popular and the scenery stunning, the offerings of the Park could only engage visitors for a short time - essentially the time it takes to complete one to two walks across the bridge.

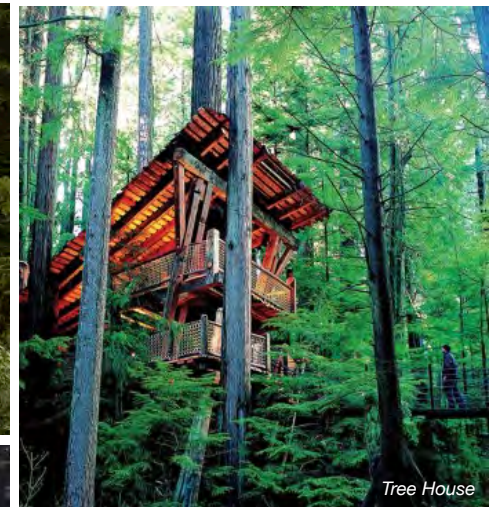


The development of activities to transform the Capilano Bridge into an integrated attraction is what led to its success.

More importantly, the activities that have been developed have not been selected at random or just for being trendy at the time. Instead, they have been carefully designed to be perfect companions to the Park's main attraction, or its reason for existence, and thereby helped to cement, rather than distract from, the Park's identity.

For instance, one main attraction is the Cliffwalk, a series of unobtrusive and suspended walkways taking visitors through the rainforest and to the side of granite cliffs above the Capilano River. Opened in 2011, it caters to those looking for the adrenaline rush the original Bridge offers.

Treetops Adventure rounds out the mix of main activities. With seven connecting, small bridges suspended from trees, fairytale like treehouses, and storyboards with facts about the rainforest throughout, the experience is both whimsical and educational.



CAPILANO SUSPENSION BRIDGE VANCOUVER, CANADA

Story Telling & Creating an Experience

Ultimately, the physical components themselves only make up a limited portion of the experience. Elevated walkways could be exciting but soft amenities such as stories, history, and an interactive learning experience are what make the visit unique and memorable.



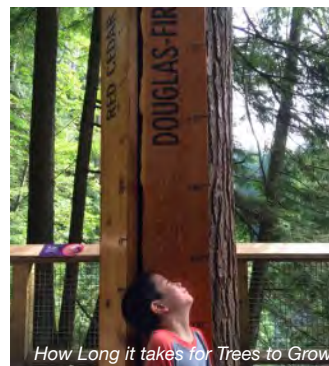
Portion of Park Dedicated to First Nations Culture

For instance, although not having played a significant role in the original development, nature and cultural links to the land have been heavily utilized to the benefit of developing the attractions.

The First Nations' culture, stories of past owners, as well as a wealth of information on the temperate rainforest ecosystem unique to the West Coast have been interwoven into the offerings with excellent storyboards and displays throughout the Park to engage visitors in a creative and interactive way.



Exhibit on the Lives of Past Owners and History of the Bridge



How Long it takes for Trees to Grow



Capilano is home to the largest private collection of First Nations totem poles in North America and a dedicated part of the Park showcases their culture.

Complimentary history and nature talks are offered hourly within the Park, introducing visitors to the flora and fauna they are likely to find on their strolls through the rainforest.

Raptors Ridge, an education facility dedicated to raptors and the conversation of wildlife is open for three months of the year.



Storyboard Display of the area's Geology



CAPILANO SUSPENSION BRIDGE VANCOUVER, CANADA

Visitor Center Facilities / Functions

- Ticket sales.
- Interactive exhibits:
Story Center, Kiapalano, Living Forest.
- The Trading Post gift store.
- Bathrooms throughout Park.

Other Facilities / Events:

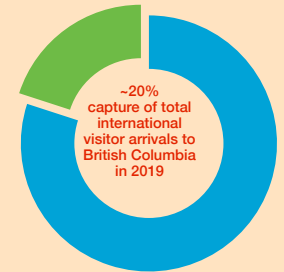
- Limited pay parking.
- Free shuttle from Downtown Vancouver.
- Variety of food and beverage options throughout the Park including a 76-seat restaurant overlooking the canyon, a casual grill, a cabin style cafe, and an ice cream creamery.
- The Kids' Rainforest Explorer Program.
- The annual Canyon Lights event during the festive season where winter is celebrated with lights.

Prices (in CAD)

- Ticket: \$55 adult, \$30 youth, \$19 child.
(Residents of British Columbia get an annual pass for the price of a single ticket).
- Free for children under 6.
- Parking: \$6 for 3 hours.

Visitation Level

1.2 million per year
3,000 visitors per day



CAPILANO SUSPENSION BRIDGE VANCOUVER, CANADA

Key Takeaways & Lessons for Marpi



Value of an Integrated Attraction

Regardless of how thrilling walking across the river on a suspension bridge may be or how beautiful the setting, it is a simplistic activity that may not remain engaging after one or two trips across.

As such, offering visitors more activities to increase the attractiveness of the Park and lengthen the amount of time they could spend there is crucial to **providing more value and thereby justifying a higher ticket price.**

As standalone activities, the offerings of Capilano may not perform as well; but as one attraction with a strong identity, the value is significantly increased.

A similar approach could be applicable to Marpi, where a greater experience could be created through the integration of a variety of tourism resources, which, while different, are all deeply rooted in the history and identity of the CNMI.



Engaging Guests through Experiences

Rather than limiting information to a central exhibit, **interactive displays and storyboards are present throughout the park to keep the visitor engaged for the entire journey.**

More importantly, information and knowledge are presented in creative ways that are easy to visualize and make them more interesting to children and adults alike.

For instance, the height of the suspension bridge being compared to the Statue of Liberty, the impacts of erosion shown visually with water dripping onto stones, and the height of trees shown in years.

This approach could be useful, especially with respect to Banzai Cliff and Suicide Cliff, in helping to transform the activity of simply viewing into an experience that involves learning and establishing emotional connections through stories.

HANAUMA BAY HAWAII, UNITED STATES

Blessed with calm water, abundance of fish, and a beautiful setting within a volcanic cone, Hanauma Bay has long been a jewel of Oahu. Its development increased after World War II, with the addition of new restrooms and showers to the basic facilities and steep passageway down to the base of the crater wall built in the 1930s. With its crystal clear, shallow waters, impressive marine life, beautiful scenery, and relatively short distance from Waikiki, naturally, Hanauma Bay became hugely popular with tourists.

Uncontrolled visitation levels reaching a few million people a year quickly led to the depletion of irreplaceable natural resources. Although declared a protected marine life conservation area and underwater park in 1967, it was not until the 1990s that clear measures were taken to start preserving the area.

In 2002, a USD 13 million education center where guests are required to watch a 9-minute educational video about the preservation of marine life prior to entry was opened. The center also administers entrance tickets, operates a tram down to the beach, and is home to a gift shop, interactive kiosks and numerous informational displays.

Just as importantly, a limit of 3,000 visitors per day, along with a one day per week closure, was introduced. Even under the controlled levels, Hanauma Bay still enjoys around a million visitors per year, making it the third most popular attraction in Oahu.



View of Hanauma Bay from Upper Level where the Visitor Center is Located



Significantly Improved Conditions at Hanauma Bay during COVID

The Importance of Preservation

Its beautiful setting and stunning marine ecosystem are undoubtedly the most important assets to Hanauma Bay. While the sustainable utilization of these resources has been somewhat overlooked in the past, the government stepped in in the 1990s to preserve the area and reduce the impact of visitors.

More recently, closure due to COVID-19 further highlighted the impact that heavy visitation has had on the ecosystem and how the environment could benefit immensely from reduced human activity. The bay was closed for nine months and reopened in December 2020 with further reduced visitor levels (720 per day and 120 per hour) at a higher entrance fee of USD 12 (up from the previous USD 7.50).

Nine months of rest allowed the ecosystem to heal; water quality improved while the plethora of coral and fish began to restore. It is reported that endangered species found at Hanauma Bay including sea turtles and monk seals have been seen in greater numbers.

HANAUMA BAY HAWAII, UNITED STATES

Education Center Facilities / Functions

- Ticket sales.
- Gift shop.
- Educational video that all first-time visitors are required to watch prior to entry into the bay.
- Interactive computer kiosks with educational information on the marine life.
- Exhibits / displays that showcase the marine ecosystem, how it has formed over thousands of years, and the urgency to preserve them.



Other Facilities

At the upper level:

- Parking lot with 300 stalls.
- Snack bar by parking lot.
- Tram from Education Centre to the beach.

Prices (in USD)

- Ticket: \$7.50 (increased to \$12 post COVID).
- Free for residents and children 12 and under.
- Parking: \$1 (increased to \$3 post COVID but unchanged for residents).

At the beach level:

- Snorkel rentals.
- Showers and restrooms.
- Lockers for rent.
- Lifeguard.
- Picnic area.

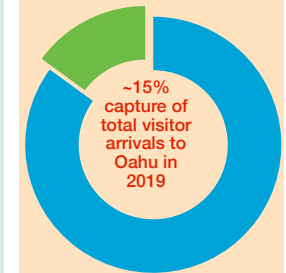
Activities

- Snorkeling.
- Beach.

- Shuttle: \$1 down, \$1.25 up.
- Snorkel rental: \$20 per set.
- Locker rental: \$8 small, \$10 large.

Visitation Level

1 million per year
3,000 visitors per day



HANAUMA BAY HAWAII, UNITED STATES

Key Takeaways & Lessons for Marpi



Preservation via Management of Visitation Levels

As seen in the negative impacts Hanauma Bay's marine ecosystem suffered over decades prior to the 1990s, unmanaged visitation to areas with delicate environments could lead to significant damages. Measures introduced since then, especially the limitation on visitor volume, have helped immensely with the ecosystem's gradual recovery.

This is a key takeaway to be recognised and is particularly applicable to the Grotto and Bird Island.

Given their delicate ecosystems, potential activities, including snorkeling, diving and visitations to the beach, should be actively managed to ensure the sustainable enjoyment of the area's precious natural resources. Preservation measures should ideally apply to both visitor volume and the extent of tourism activities suitable to these areas. The establishment of an integrated tourism area managed through a visitor center could be crucial to the implementation of preservation measures for the Grotto and Bird Island.



Interactive Information on the Fragile Marine Ecosystem

In addition to a cap on the number of visitors, the Marine Education Center at Hanauma Bay has also played a crucial role in limiting further damage to the area's marine life and allowing for recovery to take place.

Established with the goal to provide visitors with information on how and why the ecosystem at Hanauma Bay should be preserved, the Center's mandatory video, interactive kiosks, and displays encourage visitors to treat Hanauma Bay as a "living museum". Basic knowledge such as not walking on reefs, not touching marine life, and not wearing toxic sunscreen are shared, in addition to more engaging information on the formation of the Bay and the variety of marine life visitors could expect to see.

A similar educational component is also crucial in respect to the fragile ecosystems at the Grotto and Bird Island. This is particularly applicable given the CNMI's large proportion of visitors from North Asia who may be less familiar with marine ecosystems.

CLIFFS OF MOHER VISITOR CENTER CLARE, IRELAND

The most visited natural attraction in Ireland, the Cliffs of Moher stretch for five miles and stand majestically, 700 feet above the Atlantic Ocean. Formed over 300 million years ago, the Cliffs of Moher has served as the backdrop for many iconic films like The Princess Bride and Harry Potter.



Part of the UNESCO Global Geopark, the Cliffs are a designated protected area for breeding seabirds of over 20 species. With its natural majestic beauty being the area's single important asset, the only visible structure is the O'Briens Tower, built in 1835 at the highest point of the Cliff, offering a great observation platform at the top.

With a Euro 10 million grant from Failte Ireland, an eco friendly Visitor Centre was built in 2007. Offering numerous interactive exhibits about the geology and history of the area, the Visitor Centre's aim was to **bring the story of the Cliffs to life.**



CLIFFS OF MOHER VISITOR CENTER CLARE, IRELAND

Visitor Center Facilities / Functions

- Ticket sales.
- Interactive exhibits.
- Gift shop.
- Cafe with picturesque views over the Cliffs.
- Bathrooms.

Other Facilities

- Car park.
- O'Briens Tower with viewing platform at the top.
- 0.5 miles of safe walking paths with ranger support.
- Viewing platforms and interactive telescopes.

Prices (in Euro)

- Ticket: \$8
(half price if booked online for visitation between 8 to 10am and after 4pm for crowd management).
- Free for children under 16.

Activities

- Viewing of the Cliff.
- Walking.
- Parking: \$6 per person in car.
(included in visitor center ticket).
- O'Brien Tower entry: \$2.

Visitation Level

1.5 million per year
4,000 visitors per day



CLIFFS OF MOHER VISITOR CENTER CLARE, IRELAND

Key Takeaways & Lessons for Marpi



Concessions at the Visitor Center

Ticketing for a Natural Site & the Need to Add Value

Given that the Cliffs is a very large natural site that could be viewed from many places without charge, introducing a ticket for such areas typically raises the need to justify the price of the ticket.

Even with the Visitor Center, the Cliffs remains free for everyone unless they need to park. However, given that it is around a 15-minute drive from the closest town, most visitors require parking, with public transport options being limited. Although some may argue that the parking fees essentially require visitors to purchase tickets, rather than focusing on that, the Visitor Center aims to **offer a value-adding component that is ultimately a worthwhile supplement to the Cliffs experience.**

Public reviews indicate that the Visitor Center is in fact recommended as a must see part of the Cliff and is praised for the wealth of information it offers on the natural wonder's geology and history.

In the case of Marpi, this is particularly applicable to the sites of Banzai Cliff and Suicide Cliff. It is critical that, rather than just being sites included in an overall ticket for Marpi required for the popular Grotto, they offer an experience that is greater than just viewing and taking photos of the views and truly add value to a Marpi visit in the minds of guests.

Harmony with Nature

Given that the stunning beauty of its natural scenery is the selling point of the Cliff of Moher, it is critical that the presence of the Visitor Center does not detract from it. Built into the side of a small hill in the landscape, the Center blends in harmoniously with the surroundings and has minimal impact on the natural beauty and pristine state of the area.

Similarly, the proposed Marpi Visitor Center should ideally be built to blend in well with the beauty of the oceanside hilltop landscape and be minimally invasive to the natural state of the area.

STONEHENGE VISITOR CENTER WILTSHIRE, ENGLAND

A UNESCO World Heritage Site, the stones are believed to have been raised more than 4,500 years ago by prehistoric people. It was donated to the nation in 1918 by a local barrister and his wife. Since then, Stonehenge has been cared for by English Heritage.

While Stonehenge has impressed visitors for centuries, the opening of the Visitor Centre and restoration of the surrounding area to its original landscape in 2013 brought a renaissance to the attraction.



Stonehenge

The high profile, 27 million pound project involved the development of a visitor center and museum as well as the removal of concrete excrescences from the 1960s.

With the modernization, the redesign of the overall experience, particularly in respect to the ‘wow’ factor Stonehenge imparts on visitors under the new arrival flow is perhaps of greater importance than the visitor centre itself.

Now, rather than driving up an unattractive access road and disembarking in an old parking lot, a visitor’s Stonehenge journey begins at the Visitor Center, which is housed in a low impact structure designed to blend in perfectly with the landscape. Located a mile and a half from the archeological site, the Visitor Center is designed to be completely hidden from view.

Here, visitors learn about the historical significance of Stonehenge and marvel at how difficult it must have been for prehistoric people to build the monument.

Visitors then have the option of arriving at the stones on foot, the recommended way since the approach is expected to mirror that in ancient times with the landscape restored to its original state as much as possible. A shuttle from the visitor center is available for those who need it and the ride is around 10 minutes.



Visitor Center built to Blend into the Landscape

STONEHENGE VISITOR CENTER WILTSHIRE, ENGLAND

Visitor Center Facilities / Functions

- Ticket sales.
- Permanent and changing special exhibition.
- Museum with 300 archaeological items.
- Gift shop.
- Cafe with indoor and outdoor seating.
- Bathrooms.

Other Facilities

- Car park.
- Shuttle between the stones and the visitor center.
- Outdoor Neolithic village with prehistoric houses.
- Reconstructed wooden roller system thought to have been used to transport the stone.

Prices (in Pound)

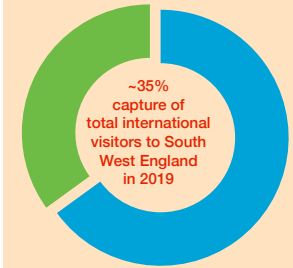
- A timed entry ticket system to manage the visitor experience - entry is only guaranteed if ticket is purchased online in advance.

Activities

- Learning about the Neolithic period.
- Viewing the stones.
- Walking.
- Ticket: \$17.5 adult, \$10.5 child (free entry for English Heritage members).
- Parking: free with visitor center ticket.

Visitation Level

< **1 million** per year
2,500 visitors per day



STONEHENGE VISITOR CENTER WILTSHIRE, ENGLAND

Key Takeaways & Lessons for Marpi



Managing Visitations to a Historical Relic

Unlike at Hanauma Bay or the Capilano Bridge Park, where touristic activities could be conducted at managed levels appropriate for the preservation of the environment, Stonehenge is a **historical relic that essentially could not host any activity other than viewing.**

In addition to the inherent impressiveness of the relic, it is important that the overall experience is enhanced through various measures that help to tell a story, making it more engaging for visitors than simply looking at the stones.

This is particularly applicable to Suicide Cliff and Banzai Cliff where the hosting of touristic activities may not be appropriate or desirable given the historical significance of the sites. Instead, they present the opportunity to incorporate a more meaningful and unique component to Marpi, one that could be a reflective journey for visitors.



Ways to Extend the Experience

Ways that Stonehenge employed to enhance the overall experience include the following:

- A well designed exhibition that showcases not only the suspected origin of the stones but also the period during which they were built.
- Reconstructed wooden roller system which is theorized by archeologists as to have been used to transport the stones from South Wales, 240 miles away. This display, showing the sheer size of each stone and the rudimentary transport scheme, helps visitors visualize how difficult the endeavor must have been.
- An outdoor Neolithic Village reconstructed based on remains found at Durrington Walls. There are often re-enactments and demonstrations by volunteers inside these houses and being able to play in the houses Neolithic man lived in is particularly popular with children. They help reconnect the ancient stones with the people that lived and worked in the landscape.

Lastly, the sequence of the experience also plays a key role. Having information prior to seeing the stones could help make the first impression more impressive.



3. RECOMMENDATIONS FOR MARPI

- ✓ Overall development rationale and guiding principles?
- ✓ New facilities and activities?
- ✓ Community initiatives?
- ✓ Revenue opportunities?

DEVELOPMENT RATIONALE FOR MARPI

Based on the analysis of Marpi, highlights of the area's resources that could be utilized, in respectful and sustainable ways, include the following:

Natural

- Beautiful scenery with majestic ocean views.
- Impressive marine ecosystem home to a wide variety of sea life and birds.
- Rainforest.

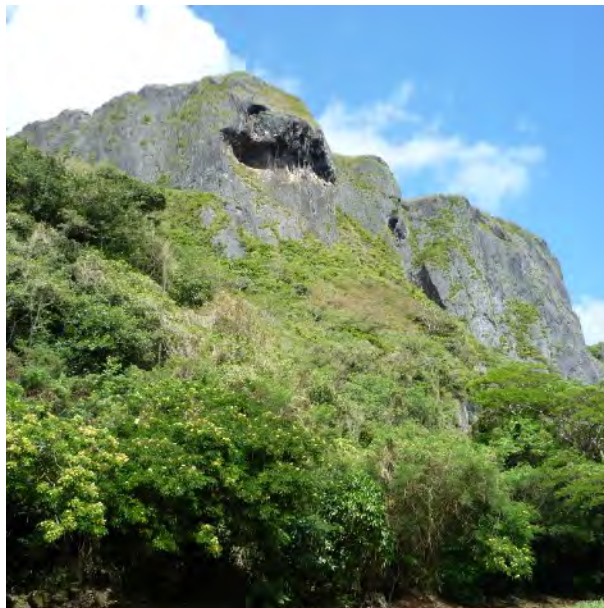
Cultural

- Historical significance as a key place during the Second World War.
- Sites that evoke a sense of remembrance and honoring one's heritage.

All of these resources differentiates the CNMI from the gamut of beach resort destinations in Asia and should be highlighted as strengths rather than overlooked.

In their current state, it is easy for the average tourist to miss the wealth of experience these attractions could offer and possibly even view them as dilapidated sites lacking points of interest or meaning.

As such, the development of Marpi should focus on enabling the area to achieve its prime potential such that these precious resources could be proudly presented as valuable assets of the CNMI in their full glory.



MARKET POSITIONING & GUIDING PRINCIPLES

Goal: To sustainably draw upon Marpi's valuable natural and cultural assets to create a heart warming and enriching experience that visitors will remember their trips to the CNMI by.

In considering if an activity or facility is appropriate for the proposed Integrated Marpi Area, in addition to its potential to increase visitation, it would be advisable that the following criteria be considered:

- Does it showcase the CNMI's natural and / or cultural assets?
- Is the potential impact on the ecosystem manageable and within an accepted level based on environmental impact studies?
- Is it appropriate and sensitive to the CNMI's culture and encourages involvement of the local community?
- Is it sustainable in the long run in terms of potential demand rather than simply being trendy?



PROPOSED MAINTENANCE OF EXISTING FACILITIES

Given the somewhat neglected state of many existing facilities in Marpi, it is important that resources be directed towards the maintenance and upgrade of these facilities prior to or in conjunction with the development of new ones.

Proper maintenance and upgrade where necessary should be carried out for all existing facilities in Marpi. The upgrades should ensure that the following existing facilities in particular **reach standards commensurate with the whole areas post the development of new facilities:**

- Pathways.
- Pavements.

- Stairs.
- Railings.
- Bathrooms.
- Security huts.
- Trash cans.
- Pavilions.
- Benches and tables.
- Signage.

Depending on the state of the individual facilities, the level of upgrade could range from a new coat of paint (for facilities that received more recent upgrades) to a complete overhaul or removal (for older, unkempt facilities such as the bathrooms at Banzai Cliff).



SUMMARY OF PROPOSED NEW FACILITIES, ACTIVITIES & SERVICES

The new facilities, activities and services proposed are based on the guiding principals and consideration criteria presented earlier as well as key takeaways drawn from the case studies. They are presented below, grouped by location. Detailed recommendations for each will be presented subsequently.

Centralized Visitor Center Area (1)

- Parking.
- Shuttle from Garapan.
- Visitor Center

Along Visitor Route within Marpi (2)

- Hop on hop off tram.
- Clear signage for the various sites.
- Markings for pedestrians, bikes, and tram.
- Lookout / viewing platforms for photo opportunities.

The Grotto (3)

- Setup ideal for photos.
- Dive / snorkel rental shop.

Bird Island Beach (4)

- Upgraded stairs down to the beach.
- Lifeguard / Security.
- Food and beverage concession at upper lookout area.

Connecting Suicide Cliff and Banzai Cliff (5)

- New attraction: Peace Walk.

Section of Marpi Forest (6)

- New attraction: Forest Adventures



PROPOSED NEW VISITOR CENTER: BUILDING

Concept

Based on research of successfully established facilities and publications on visitor centers such as those prepared by UNESCO, the following are critical functions the new Marpi Visitor Center is proposed to serve:

► Manage Sustainable Tourism

Control and filter visitor flow to Marpi according to established capacity limits via ticketing. In addition, act as an easy transition into the various sites of the Marpi Integrated Area.

► Interpretation of Heritage and Education

The goal is to inform visitors about the features of the Marpi Integrated Area prior to their journey, encourage them to spend more time, and promote responsible behavior while they are at the various sites.

► Community Engagement

Bring about benefits to the local community through participatory and inclusive approaches, creation of new employment opportunities, as well as sale of locally produced merchandise at the gift shop.

According to guidelines for UNESCO World Heritage sites:

“Managing visitor movement and influencing visitor behavior are considered as critical aspects of developing sustainable tourism: they are crucial to protecting the values and attributes of the sites and contribute to a high quality visitor experience.”



Example of Simple Visitor Center Exterior: Blue Mountain Sydney Australia



Example Outdoor Parking: Yangmingshan National Park Taiwan

Location & Arrival Flow

In creating an integrated attraction, providing a coherent experience for the entire area is of critical importance. This begins with the arrival experience, for which the following considerations are recommended:

► Shuttle from Garapan

A shuttle service for all visitors to Marpi from Garapan may be necessary to bypass the tour group model and facilitate visitation by more visitors without rental cars. Evident in the higher percentage of Chinese visitors to the existing attractions in Marpi, they are also the nationality segment that uses rental cars the most. For Korean visitors, the all inclusive resort model most of them purchase and the lack of individual transport could be reasons for this segment's low capture rate in the past. A shuttle is likely to be necessary to make a drastic difference to the current visitor capture and ensure transparent and universal pricing for Marpi across all market segments.

► Centralized Parking

Centralized parking in close vicinity to the Visitor Center for self-drive visitors. While studies need to be conducted to see if it is possible to eliminate through traffic within the main route inside the Marpi Integrated Area, it would be ideal for all cars visiting Marpi to be parked at the entrance to create a traffic free experience within the area and also restrict individual visitation to the Grotto and Bird Island as was the case in the past.

► Location at Last Command Post

Last Command Post is an ideal location for the Visitor Center and Centralized Arrival given that it is essentially the entry point to Marpi for traffic from Garapan.

PROPOSED NEW VISITOR CENTER: BUILDING

Sizing

Given the expected visitation level, which will be detailed in latter parts of this section, a **small to medium scale visitor center of around 1,000 square meters** is recommended.



Design Considerations

The following are some key considerations to be addressed in the design and construction of the proposed Visitor Center:

- It is strongly advised that an **immersive style** be adopted as to be harmonious with the beautiful natural surroundings at the site of the Last Command Post. Particular attention should be paid to the choice of construction materials and color. As an example shown earlier, both the Stonehenge Visitor Center as well as the shuttles have adopted immersive styles and earthy tones to keep the surroundings as indigenous as possible.



- Incorporation of indigenous materials** and styles where possible to strengthen links between the Visitor Center and the area's heritage. As an example, many of the Capilano Bridge Park's facilities are constructed from reclaimed wood from the area, highlighting its commitment to the environment as well as to the local community.
- Views** are important components of the arrival experience.
- Sustainability** is also key particularly given its location in an environmentally sensitive area. Shading, green roofing, as well as protection from natural elements such as typhoons are key issues to be addressed.
- Cost control** is critical since while the Visitor Center needs to be functional, it is not intended to be the attraction. Its function is to manage and enhance the guest experience for the Marpi Integrated Area. As such, the Visitor Center building does not need to be elaborate or a landmark in its own right in this case.
- Along the same lines, for the educational component, rather than having a high tech focus, given the nature of the CNMI and Marpi's attractions, a **high touch focus** may be more ideal. This will be elaborated on in subsequent sections.



PROPOSED NEW VISITOR CENTER: THE INSIDE

For the interiors of the proposed Visitor Center, the following functional areas are recommended:

General Welcome / Reception Area

- Around 200 square meters.
- General ticketing booths.
- Bike rental booth.
- Bathrooms.
- Could adopt a covered, but semi open design which enables airflow and appears less crowded especially with the arrival of visitors on the shuttle.

Gift Shop

- Around 100 square meters.
- Feature locally produced merchandise as a way to encourage community “buy in” and differentiate its offerings from the gamut of stores in Garapan.

Small Cafe

- Around 100 square meters including a simple food preparation area.
- An outdoor terrace off of the indoor space featuring pleasant views, seating and shading.
- Serves drinks and light snacks for consumption at the terrace space or takeaway.

Education Exhibits

- Two exhibits totaling around 600 square meters.
- One: The Wonders of Nature
- Two: War and Peace
- The **ultimate size of each exhibit, and therefor the overall area, will depend on the amount of material to be presented.**
- Given that two dedicated activities (Peace Walk and Forest Adventures) are proposed, while some background information should be provided on the historical component and the forest, the exhibition space should **focus on the most important information prior to the Marpi journey, namely critical marine life protection knowledge with respect to the Grotto and Bird Island.**
- As such, for the exhibit on nature, in addition to presenting the geology and ecosystems of Marpi, emphasis should be placed on **essential safety issues for visitors regarding any water activities** in these areas and how their responsible behavior are necessary to help protect the wild and marine life they are likely to encounter on their journey.
- To make the experience more engaging for visitors, we recommend that story boards and displays featuring interesting facts be used rather than a video.



PROPOSED MARPI ROUTE FACILITIES

For the main route connecting the various sites within the Marpi Integrated Area, the following facilities are recommended:

Signage & Markings

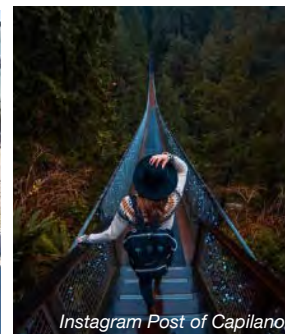
- Clear signage throughout indicating various points of interest, ideally including distance markers, which many pedestrians find helpful.
- Clear markings for visitors who choose to walk and / or cycle.

Hop on hop off Tram

- Environmentally friendly buggies that loop the main route so visitors could choose to hop on and off at various points.

Lookout Platforms & Photo Spots

- Provide a number of lookout platforms at areas along the route with the most interesting views.
- Safety permitting, some lookouts could offer seating and / or special features that make them especially popular as photo spots. As depicted below, many attractions benefit from market exposure resulting from visitors posting their photos on social media.



MANAGED DIVING & SNORKELING AT THE GROTTA

Having gained knowledge on the geology of the Grotto and its often precarious tidal conditions at the Visitor Center, not all visitors to the Marpi Integrated Area may choose to go into the water at the Grotto.

Setup Ideal for Photos

For those who simply wish to see the Grotto and take some pictures, a setup strategically positioned to enable the best photos from land would ideal, conditions permitting. This could help discourage less water savvy visitors from floating around in crowds all in the aim of getting a photo in snorkel gear and life jacket. Instead, taking photos from land in their resort wear may be more attractive to many visitors given the right setup. Executed successfully, this could help reduce the number of visitors who go into the water at the Grotto, thereby lowering the impact on the marine ecosystem and leading to a less crowded experience for divers.

Concession for Dive / Snorkel Shop

To cater to visitors who choose to go into the water at extra costs in the form of diving or snorkeling gear rental, a dive shop serving the following functions is recommended:

- Equipment rental for diving and snorkeling.
- Certified instructors to conduct full safety briefings and ensure the safety of their customers during water activities at the Grotto.
- Bathroom and changing facilities for visitors choosing to dive and / or snorkel at the Grotto.
- While in the past snorkel / dive groups could be seen preparing on the often slippery rocks, it may be advisable that some basic facilities, such as a platform and underwater landing spot, be developed at the Grotto to facilitate safer diving and snorkeling. With that said, whether these facilities are suited to be developed or the extent to which would be appropriate should be determined by environmental impact / engineering studies.



MANAGED BIRD ISLAND BEACH EXPERIENCE

To achieve a balance between preservation (as a marine sanctuary) and utilization (as one of the key sites in the Marpi Integrated Area), it is recommended that **basic facilities be developed to encourage visitation to the beach, whilst trying to limit tourist activities, as much as possible, to walking on the beach and taking photos.**

Given the delicate marine ecosystem, strong currents, and reefs that appear could be much more susceptible to damage from less experienced swimmers and snorkelers than is the case with the Grotto, it is recommended that snorkeling be limited to the Grotto and not be encouraged at Bird Island Beach. As such, no locker or changing facilities are recommended for the beach, and going onto Bird Island itself should be actively discouraged.



Beautiful Bird Island Beach



Diamond Beach Nusa Penida Bali

Rather, by providing access to the Beach but strongly emphasizing via information at the Visitor Center and again at the Beach that swimming is not advisable, Bird Island Beach could be a **great addition to the overall Marpi product as a place to admire nature's beauty and leave no impact but take beautiful photos.** As an example, with currents that make it dangerous to swim, Diamond Beach at Nusa Penida is nonetheless rated as one of the most instagram worthy spots in Bali.

A complementary experience could be offered by having a food and beverage concession at a headland level lookout area with prime views of Bird Island. This could capture demand for drinks and snacks and cater to guests who may not want to walk down to the beach and / or want additional photos.

Beach Facilities

- Aesthetically pleasing stairs down to the beach.
- Hand written board with tidal information advising against swimming.
- Lifeguard / security.



Instagram Post of Diamond Beach Bali



Headland Concession

- Outlet serving drinks and light meals popular with Asian tourists to the CNMI.
- Outdoor covered terrace with design features that encourage photographing.



Restaurant at the Rockhouse Jamaica



Instagram Post of Diamond Beach



Instagram Post of Diamond Beach

PROPOSED PEACE WALK

With the breathtaking scenery and tragic history of Banzai Cliff and Suicide Cliff as a backdrop, the development of a one-of-a-kind trail between the two sites focused on the treasuring of peace is recommended to honor the history of the CNMI and its people and as a unique attraction that could differentiate the destination from just a tropical island where guests relax on the beach and take some photos.

Meaning and self-reflection are becoming increasingly important, especially for the younger generation of travelers who are always looking to share profound stories and discoveries from their travels beyond just beaches, posh resorts, and food.

Given that this is expected to be a one-of-a-kind attraction, the examples below, the Wisdom Path in Hong Kong and the Okinawa Memorial Park, are only shown to help with visualization.

For instance, the Wisdom Path is a landscaped installation of wooden columns inscribed with the calligraphy of verses from the Heart Sutra.

While the content and how they are presented will determine the final product, the goal is to create a heart warming and healing experience through a blend of stunning scenery, the location's tragic history, and content provided throughout the trail.

With regard to the potential content, the following are some suggestions:

Greater Focus on Peace

- It would be ideal for the content to not be limited to the Battle of Saipan or even the Second World War, but be more universal, focused on the greater topic of peace that transcends region and time.

- While remembrance of the past is important and could be displayed through memorials and monuments, rather than focusing exclusively on the horrific events of war, a greater emphasis could be placed on the preciousness of peace.
- The focus could be centered around inspiring peace, in all forms; between man, animals, and nature.

Inspire through Stories

- Studies have shown that when it comes to presenting information, stories could, often times, be more impactful and memorable than figures and facts.
- This could be stories from war, and / or the aftermaths of war, and / or acts of kindness.
- Along the same lines, quotes from literature related to this topic could also be inspiring.
- There are many great fiction, non-fiction, and movies etc. related to war and peace that visitors may find easier to relate to.



Wisdom Path Hong Kong



Wisdom Path Hong Kong



Okinawa Memorial Park

PROPOSED FOREST ADVENTURES

To round off the variety of attractions at the Marpi Integrated Area, it is recommended that a small section of the forest in Marpi be used to develop an eco-friendly, low impact activity.

More specifically, the proposed Forest Adventures is expected to consist of a network of raised walkways, providing visitors with an exciting and informative journey through the forest.

This also ties in perfectly with the theme of the Peace Walk given that the existence of any native species on Saipan after the Second World War and the island-wide reseeding with non native plants is a testament to the strength and resilience of nature.

Ideally, this should be developed in an area of the forest that features interesting species but is not extremely vulnerable environmentally.

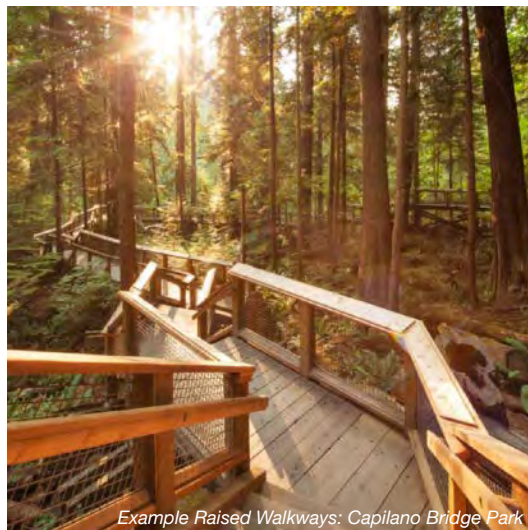
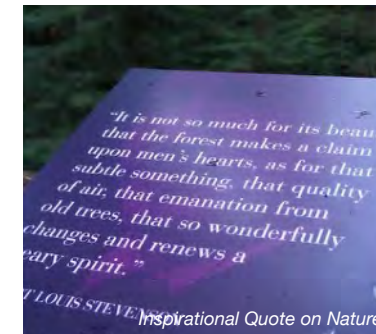
Using Treetops Adventure at the Capilano Bridge Park (consistently rated amongst the top instagrammable spots in Vancouver) as an example, the following considerations are recommended:

Raised Walkways to Minimize Impact

- Raised walkways to enable visitors to explore and learn from nature while preserving it and minimizing the level of disturbance to the forest's ecosystem and plant life.
- Many opportunities for impressive photo spots that could help boost the area's profile on social media.

Interactive Information

- Enrich the experience with information on the unique tropical dry forest ecosystem and its plant life, focusing on the importance of preservation.
- Present information via storyboards, interesting displays (see examples on right) and signage throughout the journey.



Example Raised Walkways: Capilano Bridge Park



Instagram Post of Capilano Bridge Park



Example of Information throughout the Journey: Capilano Bridge Park



Top Photo Spots Capilano Bridge Park

PROPOSED FOREST ADVENTURE - BIKING TRAILS

In addition to the network of raised walkways, it is recommended that a series of biking trails suited to different ability levels be developed.

As depicted below, Marpi's topography, views, and lush forests present the perfect setting to create unique biking adventures that could appeal to experienced trail bikers in the community and internationally as well as tourists with recreational level biking skills.

Unique Offering not Available at Competing Destinations

- Developed well, the biking trails at Marpi could be a great asset that improves the quality of life for the local community.
- Also, it could further add to the CNMI's unique differentiating factors with respect to competing markets such as Guam and South East Asian beach destinations, where such non-beach, nature-driven activities are not widely available.

Expected popularity post COVID

- As an activity, biking has become significantly more popular as many city dwellers have taken up nature-based activities such as hiking and biking during the pandemic.
- In the post COVID era, travelers will want to further their healthy lifestyle habits, and the spectacular setting in Marpi is expected to be a great draw, for biking enthusiasts and traditional beach holiday seekers alike.



SOFT AMENITIES

In addition to physical facilities, soft amenities are also essential to the overall visitor experience. For this, the following are some key areas to focus on:

Information

- **Creative and interactive ways of presenting information** so that visitors could retain some knowledge in place of the traditional plaques with extensive writing that only a small proportion of visitors may read.
- The use of stories in creative ways; for instance, even for any locally produced merchandise at the gift store.

Guided Tours

- Guided tours by local staff and / or volunteers could add to the **cultural interaction component and increase community involvement**.
- They are also great ways to help control / manage the impact of visitors, particularly at fragile sites or viewing areas.

Kids Programs

- Special programs to keep children engaged such as “passports” to look for different species and collect facts throughout the Marpi journey.
- Often times these could even prove to be popular with adults, or the kid in everyone.

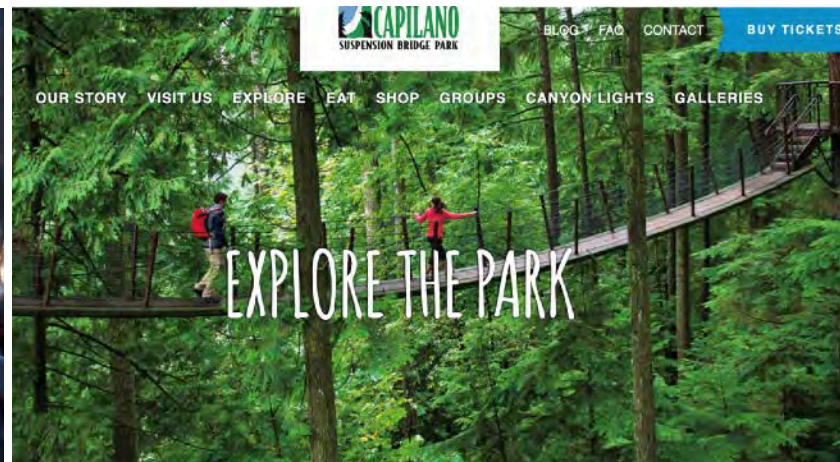
Digital Communication

- **Website:** before visitors make it to the site, a Visitor Center’s website and online presence play critical roles in **promoting the attraction**. Information on what visitors could expect to experience could help **stimulate demand**.
- **Online booking for tickets:** online booking, particularly for timed entry tickets is especially helpful in **controlling the visitor flow** and ensuring that negative impacts on the environment are minimized while the overall visitor experience is managed by avoiding over-crowding.
- **Social media:** this has become a particularly crucial marketing channel globally. It is also highly prevalent for the CNMI’s key source markets.

COMMUNITY INITIATIVES

Getting the community on board is often considered very important for attractions, particularly for those located in small townships. With respect to this, the following are potential ways of involving the community in an inclusive development approach:

1. **Generating employment** opportunities for locals.
2. **Sale of locally produced products** at the gift shop.
3. **Working with schools** to organize seasonal events and educational tours.
4. **Community events** to encourage inclusiveness. For instance, the opening of the Hanauma Bay Visitor Center and its hosting of residents was reportedly well received by the community, even by skeptics who were doubtful of the facilities during the development phase.
5. **Encouraging volunteers** from the community to be involved in programs at the Visitor Center and act as community ambassadors.

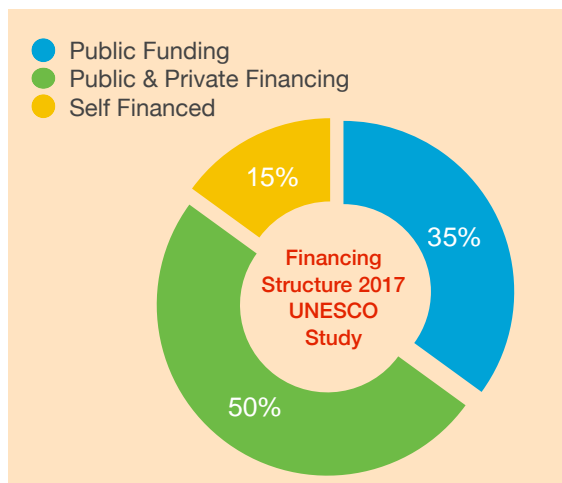


FUNDING

Based on research of existing visitor centers, a mix of public and private efforts appears to be a common type of funding structure. Typically, public funding come in the form of annual grants from related state departments while private financial resources refer to earnings from the sale of tickets and other services such as retail, food and beverage, and rental income.

In a 2017 survey involving 20 visitor centers located at UNESCO designated sites throughout Europe, **half of the centers are financed through a combination of public funding and earnings from self-financing activities**. Only 15 percent of the centers were considered self sustainable financially.

In a 2019 survey involving 77 visitor centers in Ireland, **nearly 60 percent of the centers are private enterprises** while 35 percent are owned and operated by state authorities.



REVENUE OPPORTUNITIES

The following are key assumptions used to estimate revenue opportunities for the Marpi Integrated Area:

Ticketing

- Introduce a single ticket for the entire Marpi area that covers all sites with the exception of diving / snorkeling at the Grotto, which would require extra cost for equipment rental and instructor support.
- Based on data collected from tour operators, a basic North Island tour, without snorkeling at the Grotto, is around USD 30 including transport from Garapan and a tour guide.
- Post the development of the Marpi Integrated Area, a ticket price of USD 30 to USD 35 is viewed to be appropriate. As this price falls in the higher range relative to attractions of similar nature globally as is, it is important to ensure a balance between the ticket price and visitor capture. The price would apply to all visitors, regardless of whether they choose to drive or take the shuttle from Garapan.
- As is the case with many attractions in tourist oriented destination, it is advisable that the Marpi Integrated Area be made free of charge for all residents.

Visitor Capture

- Based on data collected for 2019, the percentage capture of all CNMI arrivals achieved by sites in Marpi range from 14 percent (Suicide Cliff) to 38 percent (the Grotto).
- Post the development of the Marpi Integrated Area, a stabilized capture rate of 35 percent is estimated.
- This takes into consideration the improved attractiveness of Marpi, the increased cost for self-drive guests, who may not have had to pay in the past, and the likely growing percentage of repeat visitors to the CNMI over time.
- The estimated capture is discounted to 30 percent for the first year of operation.

Other Assumptions on Visitor Volume

- First full year of operation: 2022.
- Projections for total visitor arrivals to the CNMI are based on the critical assumption that, by the first full year of operation, travel will resume, with the COVID-19 situation resolved, and that visitor arrival levels will experience a quick rebound given significant pent up travel demand globally.
- For the first year of projections, visitor arrivals to the CNMI is estimated to be the average of the levels achieved in 2019 and the four years leading up to the boom period of 2016 to 2018.
- It is estimated that visitor arrivals will continue to grow, by 30 percent in the second year, and 20 percent in year three to surpass 700,000 (the historical peak) in a period of three years.
- Using a Design Day ratio of 0.3 percent, the number of visitors expected on an average peak day is estimated to reach nearly 750 (during the third year) if total arrivals to the CNMI rebounds to over the 700,000 mark. It is important to consider if this level of visitation may be acceptable in term of the potential environmental impact on the various sites in Marpi.

Other Visitor Center Revenue

- Retail revenue for the Visitor Center Gift Shop is estimated to be five percent of ticket revenue.
- Food and beverage sales from the Visitor Center is estimated to be five percent of ticket revenue .

Rental from Concessions

- Rental estimates for the two concessions, the Dive Shop at the Grotto and the Food and Beverage Outlet at Bird Island Lookout are based on per square meter rental calculations detailed on the next page.

REVENUE ESTIMATES

Based on assumptions presented on the previous page, the following tables summarize revenue estimates prepared for the Marpi Integrated Area. Also shown below are the Marpi Integrated Area's potential land lease and Business Gross Receipts Tax contributions based on an assumption of five percent of total revenue for each.

Revenue Estimates, Marpi Integrated Area, 2022 to 2024 (in USD)

	2022	2023	2024
CNMI Total Visitor Arrivals	453,042	588,955	706,746
Percentage Capture by Marpi	30%	35%	35%
Ticket Price per Visitor	\$35	\$35	\$35
Ticket Revenue	\$4,756,941	\$7,214,699	\$8,657,639
Retail Revenue	\$237,847	\$360,735	\$432,882
Visitor Center F&B Revenue	\$237,847	\$360,735	\$432,882
Rental Revenue from F&B Outlet Bird Island Lookout	\$129,180	\$129,180	\$155,016
Rental Revenue from Dive Shop the Grotto	\$86,984	\$131,926	\$158,311
Total Revenue	\$5,448,799	\$8,197,275	\$9,836,729
<i>Land Lease</i>	<i>\$272,440</i>	<i>\$409,864</i>	<i>\$491,836</i>
<i>Business Gross Receipts Tax</i>	<i>\$272,440</i>	<i>\$409,864</i>	<i>\$491,836</i>
Annual Visitors for Marpi	135,913	206,134	247,361
Design Day Ratio	0.3%	0.3%	0.3%
Daily Visitors on a Typical High Attendance Day	408	618	742

Rental Estimates, Concessions, 2024 (in USD)

	F&B Outlet	Dive Shop
Size (m ²)	400	75
Size (ft ²)	4,306	807
Annual Revenue per ft ²	\$450	-
Annual Revenue	\$1,937,700	\$1,978,888
Monthly Base Rent per ft ²	\$2.5	\$5
Annual Base Rent	\$129,180	\$48,420
Natural Breakpoint	\$1,614,750	\$605,250
Percentage Rent	8%	8%
Total Annual Rent	\$155,016	\$158,311

Revenue Projections for the Concessions

- For the Food and Beverage Outlet, the annual revenue per square feet is discounted for years 2022 and 2023 based on the annual visitor levels projected for Marpi for those years relative to 2024.
- For the Dive Shop, the annual revenue is projected based on the assumption that 40 percent of all visitors to Marpi will dive or snorkel at the Grotto, with each visitor paying an average equipment rental fee of USD 20 per person.

ABOUT THE AUTHOR

Darlana Zhai

Since graduating from the Cornell Hotel School in 2007, Ms. Darlena Zhai has been involved in over 300 tourism and hospitality projects, in over 75 key markets across Asia, the Pacific Islands, the Caribbean, and Africa. A Director at the Hong Kong office of Horwath HTL until 2018, Ms. Zhai has extensive experience in destination tourism planning, sustainable development, feasibility and market studies for hotel and tourism developments, hotel management contract negotiations, and asset management. Ms. Zhai was the main author for the Sustainable Tourism Development Study prepared for the Marianas Visitor Authority in 2017. Ms. Zhai's experience in the Pacific Islands also cover more than 15 other studies in markets in the CNMI, Guam, Palau and Fiji.