

Native American Tourism Development & Management Plan South Dakota

2020-2025

PREPARED BY:

International Institute of Tourism Studies

THE GEORGE WASHINGTON UNIVERSITY



Courtesy of South Dakota Department of Toursim

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ACRONYMS

AIANTA	American Indian Alaska Native Tourism Association
ATTA	Alliance of Tribal Tourism Advocates
BIA	Bureau of Indian Affairs
CCST	Crow Creek Sioux Tribe
CDFI	Community Development Financial Institution
COVID-19	Coronavirus disease 2019
CRST	Cheyenne River Sioux Tribe
DMO	Destination Management Organization
DOE	Department of Education
DOI	Department of Interior
DOJ	Department of Justice
DOT	Department of Transportation
EIA	U.S. Energy Information Administration
EPA	Environmental Protection Agency
FCC	Federal Communications Commission
FHWA	Federal Highway Administration
FPF	First Peoples Fund
FSST	Flandreau Santee Sioux Tribe
GDP	Gross Domestic Product
GF&P	Game, Fish & Parks Department
GPTCA	Great Plains Tribal Chairmen's Association
GW IITS	George Washington University International Institute of Tourism Studies
IGRA	Indian Gaming Regulatory Act
IHS	Indian Health Services
IRR	Indian Reservations Roads program
LBST	Lower Brule Sioux Tribe
MOU	Memorandum of Understanding
MSTE	Micro and Small Tourism Enterprises
MUTCD	Manual on Uniform Traffic Control Devices
NAGPRA	Native American Graves Protection and Repatriation Act
NASB	Native American Scenic Byway
NATDMP	Native American Tourism Development and Management Plan
NATIVE Act	Native American Tourism & Improving Visitor Experience Act
NCDC	Northern Cheyenne Development Corporation
NGO	Nongovernmental Organization
NHPA	National Historic Preservation Act
NIAID	National Institute of Allergy and Infectious Diseases
NOAA	National Oceanic and Atmospheric Administration
NTTO	National Travel and Tourism Office
ONAP	Office of Native Affairs and Policy
OST	Oglala Sioux Tribe
OTA	Online Travel Agency
PRACC	Pine Ridge Area Chamber of Commerce
RCIS-HC	Red Cloud Indian School - Heritage Center
RCREC	Red Cloud Renewable Energy Center
REDCO	Rosebud Economic Development Corporation
RST	Rosebud Sioux Tribe
SBA	Small Business Administration
SDDER	South Dakota Department of Environmental Resources
SDGFP	South Dakota Game, Fish, and Parks Department
SDNTA	South Dakota Native Tourism Alliance
SDSU	South Dakota State University
SDTA	South Dakota Telecommunications Associations
SRST	Standing Rock Sioux Tribe
SWO	Sisseton Wahpeton Oyate
TE	Tourism Economics
TERO	Tribal Employment Rights Ordinance/Office
THPO	Tribal Historic Preservation Officer
Thunder Valley CDC	Thunder Valley Community Development Corporation
TTP	Tribal Transportation Program
UNWTO	United Nations World Tourism Organization
USDA	United States Department of Agriculture
USP	Unique Selling Proposition
USPHS	United States Public Health Services
VFR	Visiting Friends & Relatives
WHO	World Health Organization
WWF	World Wildlife Fund
YST	Yankton Sioux Tribe



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Courtesy of South Dakota Department of Toursim

EXECUTIVE SUMMARY

Tribal Nations in South Dakota are stewards of a diverse array of natural and cultural resources that offer untapped possibilities for tourism. However, they remain hidden gems despite the many recreational opportunities available, such as nature and outdoor activities including hunting and fishing; rich cultural and sporting events such as wacipis (also known as powwows), rodeos, fairs and sporting tournaments; and casinos and gaming.

While South Dakota welcomed 14.5 million visitors, who contributed $2.75 billion to GDP in 2019, there is no meaningful connectivity of tourism flows occurring between the millions of tourists who visit the major attractions in and around the Black Hills region, Badlands National Park and Sioux Falls, and the Tribal Nations in South Dakota.[1] There is no data available on visitor arrivals except for the Pine Ridge Reservation, where several tourism attractions and site managers monitor arrivals. Pine Ridge receives an estimated 12,750 visitors per year.

In 2019, representatives from all nine federally recognized Tribal Nations in South Dakota, along with local, state and federal partners, came together as an ad hoc network—SDNTA—to assess the potential for Native American tourism. While there is a general lack of community awareness of tourism and its potential in Tribal Nations—as well as readiness and understanding of the market—SDNTA members believe that Native American tourism can be a catalyst for economic growth in Tribal Nations. SDNTA members believe that tourism can grow over time with concerted attention and effort, ultimately supporting community development and the protection of natural and cultural resources.

The Native American Tourism Development and Management Plan, South Dakota 2020–2025 (NATDMP) is the output of SDNTA's assessment of the potential for Native American tourism. It was developed over a 12-month period and involved more than 65 SDNTA local stakeholders through a participatory planning process facilitated by the George Washington University International Institute of Tourism Studies as part of a technical assistance project funded by the Bureau of Indian Affairs Office of Indian Energy and Economic Development.

Before the onset of the COVID-19 pandemic, tourism provided a promising approach to sustainable development—a way for Native American communities to generate income, alleviate poverty, increase access to health care and education, and conserve their cultural and natural resources. While tourism is not currently a viable option for many communities given the impact of COVID-19, the NATDMP provides Tribal Nations the opportunity to plan for the future so that tourism—along with other development approaches—can eventually support the economic and social well-being of Native American communities in South Dakota. The NATDMP articulates ways in which tourism can drive economic recovery and development.



Courtesy of South Dakota Department of Toursim

[1] Tourism Economics. (2019). Economic Impact of Tourism in South Dakota, 2019. Retrieved from https://sdvisit.com/sites/default/files/2020-01/19EcoImp_Tourism_Economics.pdf



Courtesy of South Dakota Department of Toursim

Where are we now?

A comprehensive analysis of the current situation identified the main issues and opportunities associated with development of Native American tourism in Tribal Nations located in South Dakota.

MAIN ISSUES	KEY OPPORTUNITIES
Most existing and potential attractions for tourism require further development. There are few existing Native American tourism experiences and tours offered in South Dakota. Due to COVID-19, many Tribal Nations are not receiving visitors. It is unknown when this will change.	**1. Create and deliver iconic Native American experiences.**
Most existing and potential tourism attractions on reservations are not market ready and need further development. Signs and directions are inadequate, and there is little sense of arrival in main towns. Public restroom facilities are inadequate. There are insufficient accommodation options on or near reservations.	**2. Improve infrastructure and placemaking.**
There are very few tourism businesses, and most are not market ready. Service and quality online ratings for accommodations and restaurants are moderate and limited. Entrepreneurs do not have access to viable financing and technical support.	**3. Enable tourism business success and viability.**
Community and Tribal leadership readiness and understanding of the market and potential opportunities of tourism is low. There is a need for hospitality and skills training in the Tribal Nation workforce.	**4. Prepare community and skilled workforce in tourism.**
Online trip planning information is limited. There is limited flow of visitors occurring between the major tourism hubs in South Dakota and Tribal Nations Complex and sensitive relationship between Native American and non-Native American communities and organizations, including at a tourism level. Tourism businesses are not organized to promote tourism in the nine Tribal Nations.	**5. Increase awareness of Native American tourism offerings in South Dakota among key market segments.**
There is limited collaboration among Tribal Nations and tourism stakeholders on tourism development. There are no Tribal government tourism offices or positions directed to manage and promote tourism in the Tribal Nations.	**6. Manage tourism collaboratively.**

Where will we be in 2025?

There is consensus among Native American leaders and other key stakeholders to work together to develop tourism as a catalyst for economic growth. The NATDMP sets forth a vision and strategy for the short and medium term that aims to increase tourism opportunities in Tribal Nations.

The guiding principles of the shared vision are:

1. **UNITY:** reunification of the Očhéthi Šakówiŋ Oyate through shared history, commonalities, and collaboration on developing regional tourism
2. **PRESERVATION:** promotion of art and culture in order to enhance self-identity and pride as well as preserve the culture, including language and traditional knowledge
3. **WOKSAPE:** recognizing Elders as the driving force of traditional knowledge and wisdom in the development of regional tourism and educating the youth to be stewards of the language and culture
4. **EDUCATION:** creating cross-cultural bridges and educating the World about Native American communities
5. **SELF-SUFFICIENCY:** providing opportunities for Tribal Nations to become self-sufficient and create pathways to enhance livelihood

VISION: By 2025, Tribal Nations are actively working with industry and state and federal partners to develop Native American tourism experiences that are attracting visitors, encouraging them to stay and experience more in Tribal Nations, ultimately bolstering local economies and the well-being of Native American communities.

The overarching five-year aim will be to develop Native American tourism opportunities in South Dakota. The main goals and corresponding strategies are outlined below.

SDNTA members believe firmly that tourism can help to promote and maintain the Lakota values of Respect, Compassion, Honesty, Generosity, Humility, and Wisdom. Furthermore, achieving this overarching goal will help to re-engage the Očhéthi Šakówiŋ Oyate as well as reinforce community pride and culture.

GOAL	STRATEGY
1. Create and deliver iconic Native American experiences	1.1 Develop authentic and differentiated Native American products and experiences that connect Tribal Nations along existing tourism routes. 1.2 Develop Native American tourism experiences that meet current (COVID-19) realities and future market demands.
2. Improve infrastructure and placemaking	2.1 Develop new attractions and enhance existing attractions needed for themed products, experiences and events. 2.2 Develop a range of lodging and facilities that appeal to South Dakota's main travel market segments. 2.3 Enhance the welcoming feel of main towns and priority attractions. 2.4 Develop public-private partnerships to fund development and/or enhancements at priority attractions.
3. Enable tourism business success and viability	3.1 Support market readiness of Micro and Small Tourism Enterprises (MSTEs). 3.2 Provide affordable financing to help start and grow MSTEs.
4. Prepare both community and a skilled workforce for tourism	4.1 Build tribal leadership and community support and buy-in for tourism. 4.2 Improve the quality of product and service delivery.
5. Increase awareness of Native American tourism offerings in South Dakota among key market segments	5.1 Develop the region as a destination. 5.2 Develop strategic partnerships to foster a greater understanding of Native American communities and promotion of Native American tourism. 5.3 Reach diversified market segments.
6. Manage tourism collaboratively	6.1 Establish tourism management and plan implementation mechanisms. 6.2 Attract investors and plan implementation partners.



Courtesy of South Dakota Department of Toursim

How will we get there?

The NATDMP outlines a set of strategies and accompanying priority actions that include a wide range of infrastructural projects , tourism attractions and product development investment projects along with community and entrepreneurship preparedness initiatives. The NATDMP presents a total of 43 priority initiatives. Implementation of these initiatives will require public and private investment and partnerships. When fully implemented, this plan will provide tangible benefits to Tribal Nations, including economic, infrastructure, and investment benefits.

Identifying leaders who can adequately inspire and facilitate coordination and collaboration among Tribal governments and partners at the local, state and federal levels will be critical for implementation of the NATDMP. It is envisioned that SDNTA will serve as the unified, multisectorial network of stakeholders that will be the main steward of the plan—guiding and managing its implementation. SDNTA will:

- Socialize the plan and secure buy-in from Tribal governments and communities; and
- Bring together the private sector, public sector, community leaders and NGOs to actively participate in the implementation of the plan.

The short-term aim of SDNTA should be to initiate and deliver on 3–5 quick-win priority initiatives outlined in this plan. This effort will help to demonstrate tangible and measurable results within the first three years. The quick-win projects can be instrumental in garnering support for the more complex medium-term initiatives.

The successful implementation of the plan will require diligent oversight by SDNTA. Progress and challenges should be carefully tracked, and strategies and priority initiatives adapted over time to meet ever-changing realities and needs.

INTRODUCTION

A. Purpose

The Native American Tourism Development and Management Plan, South Dakota 2020–2025 (NATDMP) presents a medium-term strategic blueprint. The NATDMP provides direction and guidance to tribal governments, state-level strategic partners, community leaders and the private sector for working together to enhance the preparedness of Tribal Nations to develop and manage tourism. The plan's purpose is to support the development of a sustainable Native American tourism industry that will inspire more people to visit, stay over, and spend more money in Tribal Nations, thereby contributing to the local economies and well-being of Native American communities in South Dakota.

The NATDMP assesses the potential for tourism development in Tribal Nations in order to identify key opportunities and challenges. It also outlines a shared vision, realistic goals and practical strategies for Native American tourism development and management. Due to the unprecedented effects of the COVID-19 global pandemic on all sectors of the U.S. economy, including tourism, the NATDMP incorporates strategies for enhancing resilience and rebuilding tourism over the next five years.

Findings presented in the NATDMP are based on extensive desktop research conducted by the George Washington University International Institute of Tourism Studies (GW IITS), as well as in-person and online stakeholder meetings with SDNTA, an emerging ad hoc network of leaders and community members from all nine federally recognized tribes in South Dakota as well as representatives of local, state and federal partner organizations. GW IITS site visits and monthly online meetings with the SDNTA occurred over a 13-month period from August 2019 to August 2020. The main elements of the NATDMP have been developed and validated by SDNTA. SDNTA will serve as the main steward of the NATDMP, and it is envisioned that they will guide and manage the plan's implementation.

B. Objectives

The overarching objective of this plan is to help develop Native American tourism that is led and managed collectively by community leaders from the sovereign Tribal Nations located in South Dakota. The plan aims to ensure that tourism is inclusive and boosts local economies, fosters entrepreneurship, creates new jobs, and enables Native American communities to control their narratives of the past, present and future.

The NATDMP answers these questions: ***Where are we now? Where will we be in 2025?*** and ***How do we get there?*** Specific objectives in answering these questions include:

- Assessing which tourism products and experiences are most representative of a sense of place and unique to Tribal Nations in South Dakota;
- Identifying key market segments that align with the actual and potential product offering of the Tribal Nations;
- Forecasting tourism recovery post-COVID-19;
- Understanding the implications of COVID-19 for visitor, resident, and business community experience;
- Determining the investments needed for tourism development and growth, both in terms of human capital (soft) and services and infrastructure (hard); and
- Developing a basic model for management of Native American tourism development and partnerships that can support tourism development in South Dakota.

1. SITUATION ANALYSIS

Where are we now?

This section of the plan provides a comprehensive overview of Native American tourism resources in the nine federally recognized Tribal Nations located in South Dakota, both from a supply and demand perspective. In addition, this analysis presents a thorough examination of key governance and enabling environment considerations, as well as infrastructure elements that are critical for leveraging tourism as a tool for economic development. This Situation Analysis helped SDNTA to craft a shared vision, and to develop a strategic framework for the development and management of Native American tourism in South Dakota.



Courtesy of South Dakota Department of Toursim

1.1 Tribal Nations in South Dakota

The nine federally recognized Tribal Nations in South Dakota are recognized as sovereign and operate independent of the state or federal government. These Tribal Nations trace their roots to the **Očhéthi Šakówiŋ Oyate**, meaning "People of the Seven Council Fires." Each Tribal Nation has its own government and laws, organized under its preferred structure and processes.[2] Many Tribal governments separate powers into three branches: executive (president or chairman), legislative (a Tribal Council) and judicial (a Tribal Court).[3] They also have the authority to tax their members.

Following are the nine Tribal Nations in South Dakota, along with their headquarters:

- Cheyenne River Sioux Tribe, Eagle Butte
- Crow Creek Sioux Tribe, Fort Thompson
- Flandreau Santee Sioux Tribe, Flandreau
- Lower Brule Sioux Tribe, Lower Brule
- Oglala Sioux Tribe, Pine Ridge
- Rosebud Sioux Tribe, Rosebud
- Sisseton Wahpeton Oyate, Agency Village
- Standing Rock Sioux Tribe, Fort Yates, North Dakota
- Yankton Sioux Tribe, Wagner

The present-day territories of Tribal Nations in South Dakota represent 14.4% of the total area of South Dakota (77,116 mi2).[4] Figure 1 shows the approximate location of Tribal Nations in South Dakota.

Tribal governments play an important role in fostering economic development, including tourism, and improving the quality of life for residents of their nations.

FIGURE 1: Tribal Nations in South Dakota



Source: Bureau of Indian Affairs

[2] National Congress of American Indians (2020, February). Tribal Nations and The United States: An Introduction. Retrieved from http://www.ncai.org/tribalnations/introduction/Indian_Country_101_Updated_February_2019.pdf

[3] Southeastern Oklahoma State University (2016, August 30). How Do Tribal Governments Work?. Retrieved from https://online.se.edu/articles/mba/how-do-tribal-governments-work.aspx

[4] St. Joseph's Indian School (2020). South Dakota Reservations. Retrieved from https://www.stjo.org/native-american-culture/oceti-sakowin-seven-council-fires/south-dakota-reservations/

1.1.1 Demographics

The total population of the Tribal Nations in South Dakota is 88,569—about 10% of the state's population.[5] The Oglala Sioux Tribe has the largest population (19,895), while the Flandreau Santee Sioux Tribe has the smallest (509). On average, Tribal Nations have about 10,000 residents, with 60% self-identified as Native Americans; the remaining inhabitants are from diverse ethnic groups.[6]

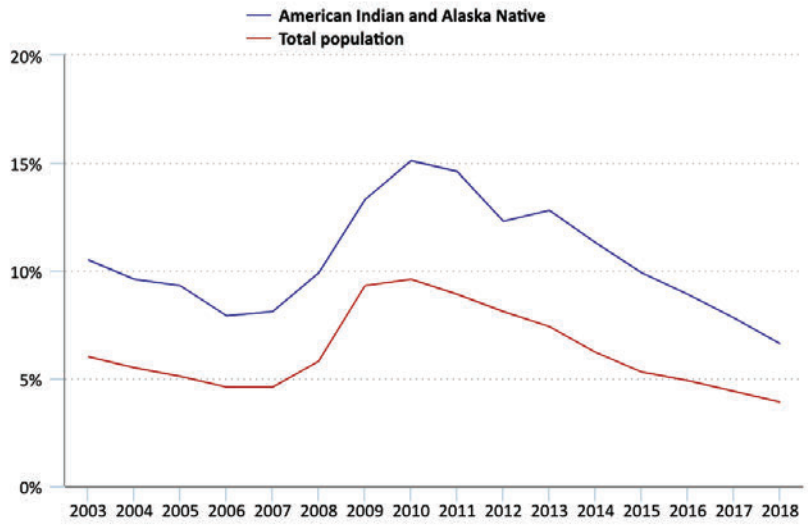
Tribal Nations have a younger population compared to the U.S. overall. The average age of Native Americans and Alaska Natives nationwide is 29.0 compared to the national average of 37.2.[7] Compared to the U.S. population overall, mortality from alcohol-induced causes is 6.6 times higher among Native Americans, mortality from chronic liver diseases is 4.6 times higher, and diabetes-related deaths are 3.2 times higher.[8]

In a study presented by the national nonprofit The Education Trust, the levels of education and attainment of degrees for Native Americans living in South Dakota are disproportionately lower for Native Americans than for the total U.S. population. "South Dakota has the lowest degree attainment rates for Native American adults at 17.6 percent, a difference of nearly 12 percentage points compared to North Dakota." The same study also concluded that 15% of Native Americans in the United States do not have a high school diploma or equivalent degree.[9]

Reservations have historically high unemployment rates. For example, on Pine Ridge Reservation (the most populated Indian Reservation in South Dakota) unemployment is estimated between 85–95%. Of those that do have employment, the median yearly income on Pine Ridge Reservation is between $2,600 and $3,500.[10]

These demographic trends for Native Americans present challenges and opportunities for Native American tourism development in South Dakota. Tribal Nations have a relatively young population and large available workforce. There is some entrepreneurial activity, albeit small-scale and informal, linked to economic self-sufficiency in light of the high level of unemployment. Tourism development may provide welcome opportunities to supplement existing entrepreneurial activity. Tourism offers the potential to reduce unemployment over time by creating more formal entrepreneurial opportunities and new jobs. With more vibrant local economies, Native American youth may choose to work in the local tourism industry rather than migrate to urban areas in search of work. At the same time, the demographic trends indicate that intensive investment in workforce development for tourism may be needed.

FIGURE 2: Comparison of Unemployment—Native American vs. Total U.S. Population: 2003 and 2018



Source: U.S. Bureau of Labor Statistics

[5] United States Census Bureau (2017). My Tribal Area. Retrieved from https://www.census.gov/tribal/

[6] St. Joseph's Indian School (2020). South Dakota Reservations. Retrieved from https://www.stjo.org/native-american-culture/oceti-sakowin-seven-council-fires/south-dakota-reservations/

[7] United States Census Bureau (2010). Profile America: Facts for Figures. Retrieved from: https://www.census.gov/newsroom/releases/archives/facts_for_features_special_editions/cb11-ff22.html

[8] Indian Health Services (2019, October). Disparities. Retrieved from https://www.ihs.gov/newsroom/factsheets/disparities/

[9] Pilar, Wil Del. (2018). Degree Attainment for Native American Adults. Retrieved from https://edtrust.org/resource/degree-attainment-for-native-american-adults/

[10] American Indian Humanitarian Foundation. Pine Ridge Statistics. Retrieved from http://www.4aihf.org/id40.html#:~:text=and%20their%20Nation.-,*%20Recent%20reports%20point%20out%20that%20the%20median%20income%20on%20the,to%2095%25%20on%20the%20Reservation

1.1.2 Local Economies

Local economics of Native American communities throughout the U.S. are driven mainly by social services, public administration, education, agriculture, and arts and entertainment. **The self-employed population of Tribal Nations is 8.5%, which is similar to the U.S. average and signals the resilience of Native American communities.**[11] For instance, studies conducted by the First Peoples Fund indicate that 51% of Native American households"on the Pine Ridge Reservation depend on home-based enterprises for cash income."[12]

In 2017, **the unemployment rate of Tribal Nations in South Dakota remained disproportionately higher than in the remainder of the U.S. overall, at around 54.8%.**[13] The general unemployment rate in the U.S. in 2017 was at 4.3%, while the general unemployment rate among Native Americans was at 6.6%.[14] In 2019, the general unemployment rate for the U.S. remained constant at 3.6%, well below the figure found across the South Dakota Tribal Nations.[15]

The COVID-19 global pandemic has wreaked havoc in the first quarter of 2020 as most economic activities came to a grinding halt nationwide. Unemployment levels have soared to nearly unprecedented levels. It is expected that Tribal Nations will be disproportionately affected by the economic fallout of the pandemic.



Courtesy of South Dakota Department of Toursim

1.2 Overview of Native American Tourism in South Dakota

Tourism is the second largest industry, after agriculture, in South Dakota. The state welcomed 14.5 million visitors in 2019, and visitor spending contributed $2.75 billion in GDP, accounting for 5.2% of the state's economy.[16] There is no meaningful connectivity of tourism flows occurring between the Tribal Nations in South Dakota and the millions of tourists that visit the major attractions in and around the Black Hills region, Badlands National Park and Sioux Falls.

Over the years, Tribal Nations have attempted to develop Native American tourism with varying degrees of success. Tribal Nations have also sought to develop tourism collectively as a driver of local economies through the Alliance of Tribal Tourism Advocates (ATTA). ATTA spearheaded planning, promotion and capacity-building initiatives that have left an indelible mark. However, ATTA has been dormant in recent years.

Tourism is not currently considered a primary economic sector of the Tribal Nations in South Dakota. This is despite the fact that there are many recreational activities such as casinos and gaming; nature and outdoor activities such as hunting and fishing; and cultural and sporting events such as powwows, rodeos, fairs and sporting tournaments that attract visitors from throughout the region. Participants of the SDNTA believe that Native American tourism can grow over time with concerted attention and effort, ultimately supporting community development and the protection of natural and cultural resources.

The Pine Ridge Area Chamber of Commerce (PRACC) and the Heritage Center at the Red Cloud Indian School (RCIS-HC), also located on the Pine Ridge Reservation, are the two organizations in South Dakota that have the most experience with Native American tourism and the only two tracking visitors at the tourism sites that they manage. The PRACC serves as an information center and for more than five years has implemented numerous projects that support tourism. Examples of these projects include the Native Discovery Partnership, which helps to promote a deeper understanding of several reservations to out-of-state travelers, and the Local Artist in Residence program. PRACC is also working to

[11] U.S. Bureau of Labor Statistics. (2019). American Indians and Alaska Natives in the U.S Labor Force. Retrieved from https://www.bls.gov/opub/mlr/2019/article/american-indians-and-alaska-natives-in-the-u-s-labor-force.htm

[12] First Peoples Fund. (2013). Native Arts as an Economic Engine. Retrieved from https://www.firstpeoplesfund.org/market-study

[13] Economic Policy Institute. (2013). Native Americans and Jobs. Retrived from https://www.epi.org/publication/bp370-native-americans-jobs/#:~:text=The%20lowest%20Native%20American%20employment,and%20Utah%20(57.3%20percent

[14] Bureau of Labor Statistics. (2019). American Indians and Alaska Natives in the U.S. labor force. Monthly Labor Review. November 2019. Retrieved from https://www.bls.gov/opub/mlr/2019/article/american-indians-and-alaska-natives-in-the-u-s-labor-force.htm

[15] U.S. Labor Bureau Statistics. (2019). Retrieved from https://www.bls.gov/opub/ted/2019/unemployment-rate-unchanged-at-3-point-6-percent-in-may-2019.htm

[16] Tourism Economics. (2019). Economic Impact of Tourism in South Dakota, 2019. Retrieved from https://sdvisit.com/sites/default/files/2020-01/19EcoImp_Tourism_Economics.pdf



Courtesy of South Dakota Department of Toursim

secure funding for the establishment of a tourism office on the Pine Ridge Reservation. Despite Pine Ridge's proximity to the popular Black Hills, very few visitors get to Pine Ridge. Most visitors spend their time at nearby attractions such as Badlands National Park (estimated 8.4%) and the Crazy Horse Memorial (estimated 4.1%).[17] See Section 1.9.5 Native American Tourism in South Dakota for a more comprehensive overview of visitors to Pine Ridge and other Tribal Nations destinations.

RCIS-HC began in 1968 as an art show, and in 1982 formally opened its doors as a museum featuring an outstanding collection of Native American fine arts and traditional Lakota arts. More recently, in 1997, RCIS-HC merged with the Red Cloud Indian School and became a department within the overall institution, which includes three schools that serve more than 600 Lakota students and six active churches that serve more than 800 families. Today, the RCIS-HC is considered a well-established anchor tourist attraction. It received an average of 10,460 visitors annually between 2017 and 2019, and its gift shop and online store provide an important market for local artists. This is especially important in light of Pine Ridge Reservation's very high unemployment rate (85–95%) and median income of approximately $2,600–$3,500 per year.[18]

The synergies between PRACC and RCIS-HC and the Pine Ridge Reservation's proximity to mainstream tourism hubs in the state have helped the Pine Ridge Reservation to emerge as the most visited American Indian reservation in South Dakota. The development of organizations that focus on tourism also illustrate the positive impacts that can accrue from tourism when there are compelling attractions and sites to visit and there are important partners helping to promote the destination. It is important to note that none of the other Tribal Nations in South Dakota have similar organizations that are primarily focused on tourism.

The South Dakota Department of Tourism (SD Tourism) is an important partner for the development and marketing of Native American tourism. The SD Tourism has demonstrated a high level of commitment to supporting development of Native American tourism and helping to drive more visitation to Tribal Nations. SD Tourism is an active participant in the SDNTA, and has provided tremendous support to the development of this plan. As part of their initiative to enhance Native American tourism offerings, the SD Tourism is working with SDNTA participants to update its official travel guide to tribal lands. It will be published in Fall 2020.

Through the SDNTA, Tribal Nations have come together over the past year to assess the opportunities and challenges for tourism in context of their traditional values. This plan presents the results of this collective assessment process, and outlines SDNTA's shared vision for sustainable tourism development, management and marketing.

[17] South Dakota Department of Tourism (2018). Pine Ridge Reservation Visitor Data 2018.

[18] ibid

1.3 Tourism Attractions

The first step in conducting an assessment of tourism's potential involves creating an inventory of the current place-based circumstances of all key components of the total tourism product in each Tribal Nation. As can be seen in Figure 3, the tourism product consists of attractions that visitors can experience, accommodations where visitors can spend the night, services such as food and beverage that are needed during their visit, transportation that ensures accessibility to visitors, and shopping options that maximize economic benefits from tourism.

The mapping of tourism attractions and resources is the foundation for tourism planning. Tourism attractions are the "pulling power" that draw specific groups of tourists to a place. This plan defines a tourism attraction as a place of interest that attracts visitors and is considered a "must-see" sight.

There are three main types of tourism attraction. **Man-made attractions** are built purposely to attract visitors (e.g., theme parks) while **natural attractions** are created by nature (e.g., national parks and rural landscapes). **Cultural heritage attractions** can be further subdivided into tangible and intangible assets: Tangible cultural heritage attractions have historical value and include historical places, monuments, and archaeological sites. Intangible cultural heritage attractions represent different aspects of daily living and include traditional knowledge; handicrafts and visual arts that demonstrate traditional craftsmanship; gastronomy; social practices and rituals; music and the performing arts; oral traditions and expressions, including language; and **events** (e.g., wacipi, rodeo).

This section of the plan provides an overview of current and potential Native American tourism attractions, discusses readiness of tourism attractions, and outlines main findings regarding options, variety, and ratings for accommodations, restaurants, services and shopping available in all Tribal Nations in South Dakota. A Companion Guide for each Tribal Nation presents a detailed list and comprehensive analysis of tourism product attractions and services in each Tribal Nation. These insights will help to identify opportunities and flag priority issues for tourism development.

FIGURE 3: Total Tourism Product



Source: GW International Institute of Tourism Studies

1.3.1 Overview of Main Findings

In October 2019, GW IITS brought together 45 community members, entrepreneurs and leaders from eight of the nine Tribal Nations, SD Tourism, other state agencies and nongovernmental organizations (NGOs) to discuss the opportunities and challenges for Native American tourism development in South Dakota. At this meeting, SDNTA participants developed a tourism asset inventory for their respective Tribal Nations that identified and prioritized current and potential tourism attractions. Subsequently, the GW IITS team expanded the tourism attraction inventory for each Tribal Nation based on extensive desktop research.

Tribal Nations in South Dakota boast a rich mixture of nature and outdoor recreation and cultural heritage resources as well as events that are ideal for tourism and have the potential to attract visitors. Existing attractions and potential tourism assets have been classified into five tourism product development categories:

1. **Nature and Outdoor Recreation:** This category refers to the natural heritage and outdoor recreation offerings in the nine Tribal Nations. Natural heritage includes rivers, prairies, forests, flora and fauna, ecosystems, and landscapes that are unique and special to Native American communities in South Dakota. Outdoor recreation, both on- and off-reservation, is a popular tourism theme throughout the state. Activities such as hunting, fishing, camping, hiking, archery, biking, and horseback riding are popular attractions on tribal lands.

2. **Cultural Heritage:** Cultural heritage refers to the legacy that the Očhéthi Šakówiŋ Oyate inherited from past generations. This includes tangible assets that have historical significance and provide cultural education and engagement. Cultural heritage attractions of the Tribal Nations include museums, visitor centers, monuments, battlegrounds, and sites of historic/spiritual significance.

3. **Culture:** Culture is all that constitutes the way of life of the Očhéthi Šakówiŋ Oyate. It includes traditions, customs, beliefs, and traditional knowledge and language. It encompasses all aspects of living culture such as storytelling, ceremonies, song and dance, culinary practices, and Native American arts and crafts.

   Culture also encompasses food production as part of the farm-to-table concept, and includes farming—a traditional pillar of the local economies of Tribal Nations—in tourism. Agritourism refers to any activity offered on a farm, ranch, or agribusiness operation or in a natural setting that invites visitors to watch or participate in agricultural activities for recreation or educational purposes. Native agritourism assets include buffalo herds, Native American agriculture, ethnobotany, and other emerging agriculture industries such as hemp farming.

4. **Events:** Events encompass a range of gatherings including wacipis, rodeos, fairs, festivals, art shows, races and sporting competitions, and motorcycle rides. Popular events celebrate Native American culture and can be a central area for tourism development and connectivity to other tourism assets.



Courtesy of South Dakota Department of Toursim

5. **Entertainment and Recreation:** This category includes **casinos and gaming**, which is an important economic pillar of eight Tribal Nations' local economies, providing a substantive revenue stream and jobs. Eleven casinos in eight Tribal Nations attract visitors to reservations throughout South Dakota.

The main findings from the comprehensive tourism asset inventory follow:

1. There are a total of 145 existing attractions across the nine Tribal Nations, of which:
   - 36 are located off-reservation
   - 48 are classified as cultural heritage resources, 43 as nature and outdoor recreation, 28 primary events, 15 culture, and 11 casinos
   - 67% are considered anchor tourist attractions
   - 50% are best suited for day trips (particularly cultural heritage attractions)
   - 49% have online ratings, with an average of 4.1 on a 5-point scale
2. SDNTA participants also identified several potential tourism assets:
   - **Nature and Culture:** local wildlife and plants, undeveloped areas for hiking and camping, hemp farms, and spaces for open-area markets for arts, crafts, and Native American products
   - **Intangible Cultural Heritage:** knowledge of the stars, Native American agriculture and culinary practices, appropriate traditional dances, and cultural games including "hand games"
3. The Oglala Sioux Tribe on the Pine Ridge Reservation has 26 existing attractions, almost twice as many as any other Tribal Nation, and the Rosebud Sioux Tribe has nine attractions. Furthermore, the Pine Ridge and Rosebud Reservations are closest to the Black Hills, a popular tourist hub that attracts thousands of visitors annually. The Flandreau Reservation, with a total of 13 existing attractions, is also near another popular state tourism hub, Sioux Falls. This positions these Tribal Nations to potentially attract visitors from these popular tourist areas.
4. The Missouri River, a major waterway running through the middle of the state, is another popular area for visitors. There are five Tribal Nations with reservations along the banks of the river: the Standing Rock Sioux Tribe (9 attractions), Cheyenne River Sioux Tribe (13 attractions), Crow Creek Sioux Tribe (9 attractions), Lower Brule Sioux Tribe (10 attractions), and Yankton Sioux Tribe (7 attractions).
5. The Sisseton Wahpeton Oyate's Lake Traverse Reservation is not located near any major tourism hubs, but has 13 primary existing attractions and is known for its abundant lakes and parks for hiking.

Let's now take a closer look at the main findings for each of the main tourist attraction categories outlined above.



Courtesy of South Dakota Department of Toursim

1.3.2 Nature and Outdoor Recreation

South Dakota is known for its natural beauty and outdoor and recreational activities. The famed Black Hills and Badlands that are the most heavily trafficked tourist areas in the state are located in western South Dakota. These areas boast eight of the twelve top-rated tourist attractions on Tripadvisor, including nature-based attractions such as Custer State Park, Badlands National Park, Wind Cave National Park, Spearfish Canyon, Mount Rushmore and Crazy Horse Memorial.[19] This tourism hub is in closest physical proximity to the Oglala Sioux Tribe (on the Pine Ridge Indian Reservation) and the Rosebud Sioux Tribe.

Cutting through the center of the state and running along five reservations (Standing Rock, Cheyenne River, Crow Creek, Lower Brule, and Yankton), the Native American Scenic Byway, which runs the length of the Missouri River, offers a wide range of both scenic and recreational opportunities for visitors and residents. To the far east, the Lake Traverse Reservation has access to beautiful lakes and forests, and the Flandreau Reservation is located further south along the Big Sioux River.

All nine Tribal Nations have a wide range of recreational activities for visitors to enjoy. Some of the more popular activities on tribal lands include river shore fishing, ice fishing, hiking, picnicking, camping, hunting, boating, horseback riding, cross-country skiing, archery, wildlife viewing and photography, and riding ATV/UTVs, snowmobiles or dirt bikes. Some Tribal Nations require recreational access permits for nonmembers 16 and over.

A total of 43 nature and outdoor recreation attractions have been identified (5 off-reservation, 38 on reservations). The nature and outdoor recreation attractions with the highest assessment scores include Memorial Park (87%) and Sica Hollow State Park (86%) in Lake Traverse Reservation, Lake Francis Case and the Fort Randall Dam near Yankton (85%), and the Japanese Gardens Dance Pavilion at Flandreau City Park (81%). The Pine Ridge, Lower Brule, and Cheyenne River Reservations have the most nature and outdoor recreation attractions, with six each (see Table 1). All Tribal Nations have at least two primary nature attractions.

Overall, the nature and outdoor reaction category has a readiness score of 72%. Though this category did not score as highly as events, due to COVID-19 considerations the nature and outdoor recreation category is the most viable for immediate to medium-term visitation and should be prioritized in the development process.

TABLE 1: Nature & Outdoor Recreation Attractions Readiness Assessment Results

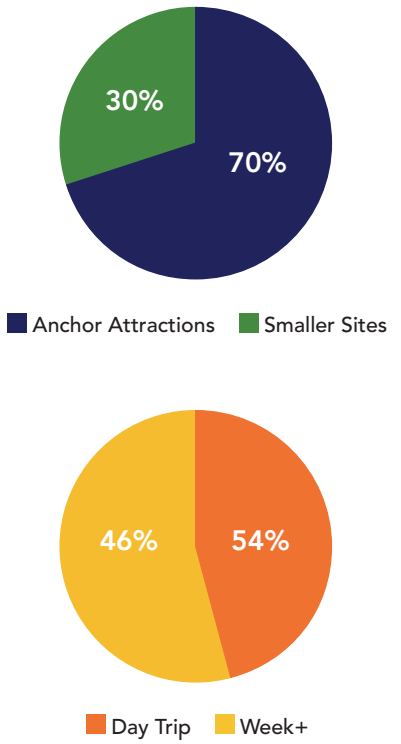
Tribal Nations	# of Attractions	Average Readiness Score	% Found Online	% with Online Ratings	Average Onlline Rating
Cheyenne River Sioux Tribe	6	57%	67%	11%	4.6 out of 5
Crow Creek Sioux Tribe	4	67%	50%	50%	4.25 out of 5
Flandreau Santee Sioux Tribe	5	72%	100%	40%	3.9 out of 5
Lower Brule Sioux Tribe	6	68%	83%	17%	4.8 out of 5
Oglala Sioux Tribe	6	74%	83%	33%	4.9 out of 5
Rosebud Sioux Tribe	4	74%	50%	0%	—
Sisseton Wahpeton Oyate	3	82%	100%	67%	4.7 out of 5
Standing Rock Sioux Tribe	2	75%	100%	100%	4.1 out of 5
Yankton Sioux Tribe	2	81%	100%	50%	3.5 out of 5
Off-Reservation	5	67%	100%	100%	4.8 out of 5
TOTAL	**43**	**72%**	**83%**	**47%**	**4.0 out of 5**

Source: GW International Institute of Tourism Studies

[19] Tripadvisor. (2020). Best of South Dakota. Retrieved from https://www.tripadvisor.com/Tourism-g28962-South_Dakota-Vacations.html

Overall, nature and outdoor recreation attractions have a good amount of information online (83% of attractions), however the number of online ratings is significantly lower (47%) and is an area for improvement. Off-reservation attractions are the only ones within this category that are all found online with rating information. All attractions in the category have positive ratings, with an average of 4.4 out of 5. Figure 4 shows the potential uses of nature and outdoor recreation attractions. There are many anchor attractions (70%), with a good distribution between day trips (54%) and longer experiences (46%).

FIGURE 4: Nature & Outdoor Recreation Attractions by Size and Duration



Source: GW International Institute of Tourism Studies

Tribal Nations boast some of the best hunting and fishing in the state, which can be enjoyed by those who purchase the appropriate licenses managed through Tribal governments.

Hunting and fishing licenses for tribal lands are more expensive than the general South Dakota state licenses,[20] and provide the Tribal Nations with a steady revenue stream through the varied hunting and fishing seasons. Tribal Nations have special hunting opportunities not available to the rest of the state. For example, the hunting season on tribal lands opens earlier than in the rest of the state.



Courtesy of South Dakota Department of Toursim

Additionally, the state of South Dakota does not allow non-Tribal members to hunt elk, however this is permitted on tribal lands including Pine Ridge, Rosebud, and Cheyenne River Reservations. Tribal Nations also offer buffalo hunting, which outside of the reservations can only be found in Custer State Park.

Other than casinos and large wacipis, outdoor recreational activities are the only tourism-related offerings that all nine Tribal Nations provide information for on their official tribal websites. Managed by each Tribal Nation's parks department, these pages provide useful information about hunting and fishing seasons and required licenses for each type of recreation, and some provide contact information for local guides. Tribal hunting licenses are required for all hunting on tribal lands, and these are not interchangeable with South Dakota state hunting licenses; Tribal members and non-Tribal members generally purchase licenses at different pricing.

Local private hunting and fishing guides can be found in all nine Tribal Nations. The easiest source of guiding services for hunting and fishing is the official Tribal Nation websites. Seasonality is an important factor for hunting and fishing, and the availability of guides fluctuates with demand. In the wake of the COVID-19 pandemic, it is unknown how each Tribal Nation will manage non-Tribal member/nonresident hunting and fishing opportunities.

[20] Solimar International. (2018). Northern Great Plains Tribal Tourism Assessment Initial Findings.

1.3.3 Cultural Heritage

The National Trust for Historic Preservation defines cultural heritage tourism as "traveling to experience the places and activities that authentically represent the stories and people of the past and present. It includes historic, cultural, and natural resources."[21] The Tribal Nations of South Dakota have an important connection to their cultural heritage which guides and influences daily life, governing systems, and spiritual customs.

A total of 48 cultural heritage attractions have been identified. As seen in Table 2, 19 of these attractions are considered "off-reservation," and 29 can be found on the reservations in South Dakota. A breakdown of cultural heritage attractions can be found in the Companion Guide that presents a detailed list and comprehensive analysis of tourism product attractions and services in each Tribal Nation.

Of all the Tribal Nations, the Oglala Sioux Tribe on Pine Ridge Reservation has the most cultural heritage attractions (10). Most other Tribal Nations have two cultural heritage attractions on their reservation; the Flandreau and Standing Rock Reservations have four. Based on the readiness assessment, cultural heritage attractions have an average readiness score of 69%. Though six of the nine Tribal Nations scored within the "green level" of readiness, these mid-level scores still indicate product development needs. Though most cultural heritage attractions scored high on accessibility and community readiness, the assessment revealed areas for improvement to increase the diversity of uses of cultural attractions, as well as address social and environmental concerns.

Cultural heritage attractions had the most information available online, and some of the highest ratings of all attraction categories. Other than on Crow Creek Reservation—which had no ratings—cultural heritage attractions had average ratings of 4.0 or higher on a 5-point scale.

TABLE 2: Cultural Heritage Attractions Readiness Assessment Results

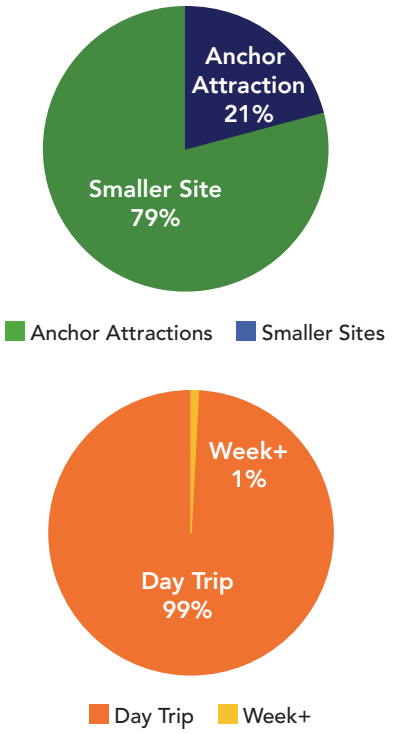
Tribal Nations	# of Attractions	Average Readiness Score	% Found Online	% with Online Ratings	Average Online Rating
Cheyenne River Sioux Tribe	2	71%	100%	50%	5 out of 5
Crow Creek Sioux Tribe	2	70%	100%	0%	—
Flandreau Santee Sioux Tribe	4	67%	100%	75%	4.5 out of 5
Lower Brule Sioux Tribe	1	74%	100%	100%	5 out or 5
Oglala Sioux Tribe	10	65%	90%	50%	4.0 out of 5
Rosebud Sioux Tribe	2	74%	100%	50%	4.4 out of 5
Sisseton Wahpeton Oyate	2	56%	100%	50%	5 out of 5
Standing Rock Sioux Tribe	4	73%	75%	50%	4.4 out of 5
Yankton Sioux Tribe	2	64%	100%	50%	4.3 out of 5
Off-Reservation	19	77%	100%	100%	4.5 out of 5
TOTAL	**48**	**69%**	**97%**	**64%**	**4.6 out of 5**

Sources: Google, South Dakota Dept of Tourism, GW International Institute of Tourism Studies

[21] Nevada Preservation Foundation. (2017). Heritage Tourism Planning Services. Retrieved from https://nevadapreservation.org/heritage-tourism-planning/

Of the cultural heritage attractions on reservations, those with the highest readiness scores include the Oglala Lakota Living History Village (87%), the Pine Ridge Chamber of Commerce Visitor Center (82%) and the Standing Rock Monument (76%). Within the 19 off-reservation cultural heritage attractions, those with the highest readiness scores are the Crazy Horse Memorial (89%), the Cultural Heritage Center in Pierre (87%), and the Journey Museum and Learning Center in Rapid City (86%). As seen in Figure 5, only 21% of cultural heritage attractions would be considered "anchor attractions," meaning a place someone would visit on its own. Additionally, Figure 5 shows that almost all (99%) cultural heritage attractions are best suited for day trips rather than longer experiences.

FIGURE 5: Cultural Heritage Attractions by Size and Duration



Source: GW International Institute of Tourism Studies

Members of the SDNTA have expressed the critical importance of community buy-in and appropriate management of cultural heritage sites, particularly those with culturally sensitive meaning. Prominent examples are the Wounded Knee Massacre Monument and various burial grounds. It is imperative that the development, management and promotion of cultural heritage tourism in South Dakota is guided by the Tribal Nations and that there is strong community buy-in throughout the process.

1.3.4 Living Culture

Culture is all that constitutes the way of life of a people. It includes traditions, customs, beliefs, traditional knowledge, and language. It encompasses all aspects of living culture such as storytelling, ceremonies, song and dance, agriculture, culinary practices, and arts and crafts. Supporting investments in and development of culture-based ventures and products is an important and viable avenue to create jobs and revenue for Tribal Nations. According to Lori Pourier, President of the First Peoples Fund, "Native art can be used as a robust and sustainable economic driver if artists have access to culturally appropriate financial and business training and affordable capital and markets, and can become part of a professional network."[22]

Native American cultural events are the primary experiences for the celebration of Native American culture, and provide artisans and practitioners opportunities to make a living sharing their culture. In addition to cultural events discussed in section 1.3.5 of this plan, there are 15 existing culture attractions on and off reservations. These include centers that provide culture and language lessons, agritourism experiences, modern-day art, administrative center for Tribal governments that feature unique architecture and places for cultural experiences.

As seen in Table 3, there are very few existing culture anchor attractions compared to other product categories, with some Tribal Nations currently having none. This shows an area of opportunity for entrepreneurs in Tribal Nations to consider developing culture-focused attractions. The culture attractions with the highest readiness scores include the Red Cloud Indian School Heritage Center on Pine Ridge Reservation (87%), the Lower Brule Administrative Building (81%), and the Sisseton Wahpeton Administrative Building (80%). Based on the readiness assessment, existing culture attractions need further development to be sustainable businesses. In addition to existing attractions, SDNTA members have shared ideas to create new attractions and experiences sharing appropriate customs and traditions such as star knowledge and language.

Most culture attractions can be found online, but far fewer have online ratings (64%). Of those that do, all have an average score of 4.2 or higher on a 5-point scale. Of the 15 culture attractions, only three are considered anchors, and the majority are smaller sites. All culture attractions are best suited for day trip itineraries.

[22] First Peoples Fund. (2013). Establishing a Creative Economy: Art as an Economic Engine in Native Communities. Retrieved from https://www.firstpeoplesfund.org/market-study

TABLE 3: Culture Attractions Readiness Assessment Results

Tribal Nations	# of Attractions	Average Readiness Score	% Found Online	% with Online Ratings	Average Online Rating
Cheyenne River Sioux Tribe	0	—	—	—	—
Crow Creek Sioux Tribe	0	—	—	—	—
Flandreau Santee Sioux Tribe	2	64%	100%	50%	4.7 out of 5
Lower Brule Sioux Tribe	1	81%	100%	100%	5.0 out of 5
Oglala Sioux Tribe	3	73%	100%	100%	4.6 out of 5
Rosebud Sioux Tribe	1	65%	100%	0%	—
Sisseton Wahpeton Oyate	4	72%	50%	0%	—
Standing Rock Sioux Tribe	0	—	—	—	—
Yankton Sioux Tribe	1	73%	100%	100%	4.2 out of 5
Off-Reservation	3	77%	100%	100%	4.4 out of 5
TOTAL	**15**	**62%**	**93%**	**64%**	**4.6 out of 5**

Source: GW International Institute of Tourism Studies

A. Agritourism

The farm-to-table concept captures nicely the inherent linkages between food production and tourism. Agriculture is the largest industry in South Dakota. In 2019, it accounted for $25.6 billion in economic output and 115,651 jobs.[23] For Native American communities in South Dakota, agriculture is a way of life and has important historical and cultural significance.

Agritourism, which is "any activity carried out on a farm or ranch, in a forest, or on an agribusiness operation that allows members of the general public to view or participate in agricultural activities for recreational, entertainment, or educational purposes" is a growing industry.[24] From 2007 to 2012, the value of agritourism grew to $704 million—an increase of 24% nationwide.

SD Tourism has prioritized the development of agritourism for the state. To this end, the Agritourism Working Group brings together agriculture and tourism stakeholders throughout South Dakota to share best practices and provide guidance for diversifying a business with tourism offerings. Recommendations from SD Tourism for potential agritourism include:

- Outdoor Recreation: Fishing, hunting, horseback riding
- Education Experiences: cooking classes, guided tours
- Entertainment: Harvest festivals, fairs
- Hospitality Services: Farm stays, local foods
- On-Farm Direct Sales: U-pick operations, roadside stands

SDNTA members identified opportunities for Tribal Nations to use their history and current agricultural practices to develop new Native American tourism attractions. For example, all Tribal Nations in South Dakota manage buffalo herds on tribal lands, a culturally significant part of their history and way of life. The Lower Brule Farm Corporation grows corn, popcorn, edible beans, soybeans, alfalfa and other farm products. It is one of the world's largest growers of popcorn, which is marketed directly from the field to major purchasers such as Conagra and American Popcorn. All of the crops are grown on lands owned by the Lower Brule Sioux Tribe and its members, and the manufacturing is done by Tribal members. Interested visitors can tour the popcorn factory and learn about the history of this crop in Lower Brule and the modern-day company's operations.

[23] Tourism Economics. (2019). Economic Impact of Tourism in South Dakota, 2019. Retrieved from https://sdvisit.com/sites/default/files/2020-01/19EconImp_Tourism_Economics.pdf

[24] South Dakota Department of Tourism. (2019). Agritourism Info Sheet. Retrieved from https://sdspecialtyproducers.org/wp-content/uploads/2019/04/Agritourism-Info-Sheet.pdf

Another unique example of agritourism opportunity is on the Rosebud Reservation, where Lakota youth entrepreneurs harvest and process local honey and sell their products through their business, Honey Lodge. In 2018, Honey Lodge was a featured agritourism business at the South Dakota Governor's Conference on Tourism.

Other potential agritourism assets identified by SDNTA members include emerging hemp farms and Native American botanicals used for spiritual and health purposes. With over 330 known plants in South Dakota used by the Lakota/Dakota people, from sage and sweet grass to berries, nettles, and elms, there is a wealth of knowledge and cultural teachings that many people—Native American and others—would appreciate learning and experiencing. Some ideas shared by SDNTA members are to create and develop existing Native American ethnobotany experiences in nature and outdoor recreation attractions such as hiking and camping. No existing Native American ethnobotany tourism experiences in South Dakota could be found through online research.

B. Native American Arts & Creative Sector

Art and handicrafts are an iconic and important aspect of Native American history, culture and way of life. To quote the Native Arts Institute, "As a cultural asset for Native communities, art has been an integral part of sustaining Native nations, culture, language and traditional beliefs, shaping community and family ties and cultural pride."[25] Studies conducted by the First Peoples Fund indicate that approximately 30% of all Native American people are practicing or potential artists, and most live below the poverty line.[26]

Native American artisans throughout South Dakota use their skills to share their culture through handmade quilts, beadwork, drums, porcupine quill work, sculpture, par flesh, jewelry, clothing, paintings, drawings and other artistic endeavors. For instance, it is estimated that 51% of Native American households on the Pine Ridge Reservation depend on home-based enterprises for cash income; and 79% of these home-based enterprises consist of some form of traditional arts.[27]

There are important synergies between tourism and the creative sector. Tourism offers opportunities to grow demand for art and creative sector products, and to develop new products, experiences and markets. Creative tourism offers compelling linkages between intangible culture and contemporary creativity.



Courtesy of South Dakota Department of Toursim

The main distribution and sales outlets for Native American arts in South Dakota are museums, galleries, visitor centers and retail shops. Artisans also sell their products at art shows, wacipis and fairs, and increasingly online. Tables 12 and 13 in section 1.6.6 of this plan identify the 29 main outlets for Native American arts on tribal lands. Pine Ridge and Crow Creek Reservations have the most outlets, with six and five respectively. All other Tribal Nations have four or fewer outlets. However, outside of reservations there are 17 outlets that sell Native American products. This demonstrates the opportunity for more outlets to be developed on reservations, either within existing attractions or in new shopping areas. SDNTA members have shared ideas and plans to develop new open-air markets for artisans near hub tourism attractions.

Financial investments and access to education and resource support for Native American artists have been proven to improve local Native American tourism economies. "Native community development financial institutions (Native CDFIs), community development corporations, youth organizations, tribal colleges and universities, cultural programs and museums, Indigenous-owned businesses, and local arts organizations are all critical to local arts ecosystems and to the overall Indigenous Arts Ecology."[28] As a part of the NATDMP, collaboration with these public, private, and educational institutions is essential to contribute to the efforts of the First Peoples Fund and other local partners to strengthen the Indigenous Arts Ecology in harmony with Native American tourism development in Tribal Nations.

While South Dakota State Statutes and the Indian Arts & Crafts Act prohibit individuals and businesses from distributing, selling, or offering for sale any article similar to American Indian art or craft which was not manufactured by an American Indian, enforcement of these laws is highly variable.[29]

[25] First Nations Development Institute. (2018). Native Arts Initiative. Retrieved from https://www.firstnations.org/projects/native-arts-initiative-nai/

[26] Ibid. First Peoples Fund.

[27] First Peoples Fund. (2013). Native Arts as an Economic Engine. Retrieved from https://www.firstpeoplesfund.org/market-study

[28] First Peoples Fund. (n.d). Investing in the Indigenous Arts Ecology. Retrieved from https://static1.squarespace.com/static/57be24e9d1758e95b6146331/t/5ac3a214352f533ad897d396/1522770485238/FPF_Investing+in+the+Indigenous+Arts+Ecology.pdf

[29] U.S. Department of the Interior. (1990). Indian Arts and Crafts Act. Retrieved from https://atg.sd.gov/docs/Indian%20Arts%20and%20Crafts%20Brochure.pdf

1.3.5 Events

Events are a special and important aspect of life for Native American communities, where people come together to share stories and food, honor the past, and celebrate the present. Throughout the year, all Tribal Nations in South Dakota host a variety of events, from traditional wacipis, also known as powwows, to annual fairs, rodeos, festivals, sporting events and races. These events are generally coordinated by annual planning committees. Events have the highest readiness score based on our assessment (75%), as seen in Table 4. Unfortunately, due to the COVID-19 pandemic, most of these large events have been canceled or postponed indefinitely.

Some Tribal Nations have visitor etiquette guidelines, however members of the SDNTA have expressed the need to create a foundational set of guidelines that can be used throughout the state and modified by each Tribal Nation as needed.

Though the South Dakota Department of Tribal Relations website lists 51 annual wacipis, SDNTA members identified 28 primary events—including wacipis, art shows, sporting events, fairs, and races—which were assessed for this report. Nine of these events occur off-reservation, most of which are hosted in Rapid City and coordinated with the involvement of all Tribal Nations. Despite having the highest readiness score out of all attractions (75%), this category has the lowest amount of information and ratings available online (39%), as seen in Table 4.

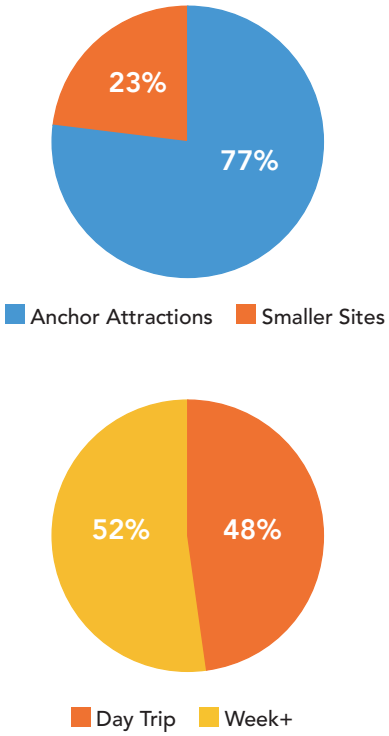
Figure 6 illustrates the potential uses of Native American Events in South Dakota. Events serve as anchor attractions (77%) that are sufficiently compelling to attract visitors to enjoy as a day trip or a multiday experience. Many wacipis run for 3–4 days, mostly over weekends, and Tribal Fairs are 4–7 days long.

TABLE 4: Events Readiness Assessment Results

Tribal Nations	# of Attractions	Average Readiness Score	% Found Online	% with Online Ratings	Average Online Rating
Cheyenne River Sioux Tribe	5	60%	40%	40%	4.4 out of 5
Crow Creek Sioux Tribe	2	69%	100%	67%	4.9 out of 5
Flandreau Santee Sioux Tribe	1	80%	100%	100%	4.3 out of 5
Lower Brule Sioux Tribe	1	85%	100%	100%	4.9 out of 5
Oglala Sioux Tribe	5	73%	40%	20%	4.5 out of 5
Rosebud Sioux Tribe	1	78%	100%	0%	—
Sisseton Wahpeton Oyate	2	80%	100%	50%	4.9 out of 5
Standing Rock Sioux Tribe	1	75%	100%	0%	—
Yankton Sioux Tribe	1	76%	100%	0%	—
Off- Reservation	9	72%	44%	11%	4.5 out of 5
TOTAL	**28**	**75%**	**82%**	**39%**	**4.6 out of 5**

Source: GW International Institute of Tourism Studies

FIGURE 6: Events by Size and Duration



Source: GW International Institute of Tourism Studies

With 51 wacipis occurring annually in South Dakota, (complete list on the South Dakota Department of Tribal Relations website[30]), there is great potential for sharing the "wacipi circuit" with more visitors outside of the Visiting Friends and Relatives (VFR) market, who currently enjoy these experiences. There is extremely limited visitor data for wacipis and other Native American events, which has been identified as an important issue to address for future event planning and management. The wacipi season in South Dakota peaks in the summer months, usually in July and August. However, SDNTA members and tourism partners have noted that it can be challenging to confirm exact dates for these events well in advance in order to share them online or in printed marketing pieces to attract more visitors.

Beyond the larger wacipis, there are a number of exciting annual events occurring across Indian Country in South Dakota, which can be seen in the Companion Guide that presents a detailed list and comprehensive analysis of tourism product attractions and services in each Tribal Nation.

1.3.6 Entertainment and Recreation

Casinos are considered anchor attractions, and can serve as a good hub for additional smaller attractions to be developed around. For some Tribal Nations, such as Lower Brule and Crow Creek, the casinos are the only accommodation options available on the reservation. As some of the most established businesses for Tribal Nations, casinos have more available funding that could be used for tourism promotion for tourism experiences on a reservation. Some casinos, such as the Prairie Wind Casino on the Pine Ridge Reservation, include regional sites and experiences in their brochures and on their websites.

Casinos in Tribal Nations are critical revenue-generating businesses, and a common entertainment attraction for visitors. Since the passage of the Indian Gaming Regulatory Act (IGRA) in 1988, Tribal gaming has grown from small bingo halls and gaming facilities valued at $121 million to a $32-billion-plus industry segment represented in over 28 states as of 2017. According to the National Indian Gaming Commission, gross revenues throughout the United States grew by 4% in 2018, to reach $33.7 million.[31] This revenue has helped Tribal Nations across the U.S. diversify career opportunities for Tribal members, support local businesses, and fund critical state, local, and Tribal government programs.[32]

There is no up-to-date public data available for Tribal gaming revenue specifically in South Dakota. However, it is widely known that casinos are an essential revenue generator for Tribal Nations. For example, in 2019, U.S. Circuit Judge James B. Loken wrote that the Royal River Casino in Flandreau,"generated roughly 40% of the Tribe's budget and more than 90% of its yearly sales tax revenue" in 2016 and 2017.[33] Casinos are also one of the larger single-business employers within Tribal Nations. Employment at each casino ranges from 60 to 120 depending on the size of the casino and services provided (gambling, dining, entertainment and accommodations)..

[30] South Dakota Department of Tribal Relations. (2020). Pow-wow schedule. Retrieved from https://sdtribalrelations.sd.gov/powwows.aspx

[31] National Indian Gaming Commission. (2018). FY14-FY18 Gaming Revenues by Range. Retrieved from https://www.nigc.gov/images/uploads/reports/2018GGRGamingRevenuesbyRangeFINALCharts_2.pdf

[32] Meister Economic Consulting. (2018). The Economic Impact of Tribal Gaming: A State-By-State Analysis. Retrieved from The economic impact of tribal gaming: a state-by-state analysis

[33] Casino.org. (2019). South Dakota Tribal Casino Expansion Work Subject to $480K Excise Tax, Circuit Court Rules. Retrieved from https://www.casino.org/news/south-dakota-tribal-casino-expansion-subject-to-tax-circuit-court-rules/

1.3.7 Market Readiness of Tourism Attractions

The market readiness of existing attractions, i.e., how prepared they are to cater to visitors, varies greatly throughout Tribal Nations in South Dakota. Figure 7 outlines the main criteria assessed and the traffic light ranking system used to determine the market readiness of tourism attractions identified for each Tribal Nation. This assessment aims to identify **the basic development needs of existing attractions and how they can fit together for the purpose of developing them into viable, market-ready commercial tourism experiences for visitors**.

Table 5 presents the attraction readiness assessment of existing attractions by category for each Tribal Nation. This consolidated snapshot reveals that attractions under the Events category scored the highest (75%) for market readiness, followed by Nature & Outdoor Recreation (72%), Cultural Heritage (69%), and Culture (62%). It is important to note that the Nature & Outdoor Recreation attractions are the most viable for further product development and promotion in the near future, in context of traveler preferences for outdoor experiences which tend to be safer during the COVID-19 pandemic.

FIGURE 7: Main Factors Assessed to Determine Tourism Attraction Readiness

ACCESS:
How accessible is the attraction by different travel methods (bicycle, walking, SUV/4x4, small car)? What are the operating hours?

USES:
How well does the attraction fulfill basic visitor interests (uniqueness, scenic value, passive activities, recreation, education)?

ISSUES:
To what degree does the attraction have social, environmental and/or economic issues (community participation, socio-cultural concerns, environmental fragility, product development needs)?

READINESS:
How interested and capable is the local community in developing the attraction (community interest, community capacity)?

GREEN = highest level of readiness
The attraction has minimal product development needs.

YELLOW = medium level of readiness
The attraction has numerous product development needs.

RED = lowest level of readiness
The attraction has significant product development needs.

Source: GW International Institute of Tourism Studies

TABLE 5: Level of Readiness of Attractions by Category and Location

Tribal Nations	Nature & Outdoor Recreation	Cultural Heritage	Culture	Events
Cheyenne River Sioux Tribe	57%	71%	—	60%
Crow Creek Sioux Tribe	67%	70%	—	69%
Flandreau Santee Sioux Tribe	72%	67%	64%	80%
Lower Brule Sioux Tribe	68%	74%	81%	85%
Oglala Sioux Tribe	74%	65%	73%	73%
Rosebud Sioux Tribe	74%	74%	65%	78%
Sisseton Wahpeton Oyate	82%	56%	72%	80%
Standing Rock Sioux Tribe	75%	73%	—	75%
Yankton Sioux Tribe	81%	64%	73%	76%
Off-Reservation	67%	77%	77%	72%
TOTAL	**72%**	**69%**	**62%**	**75%**

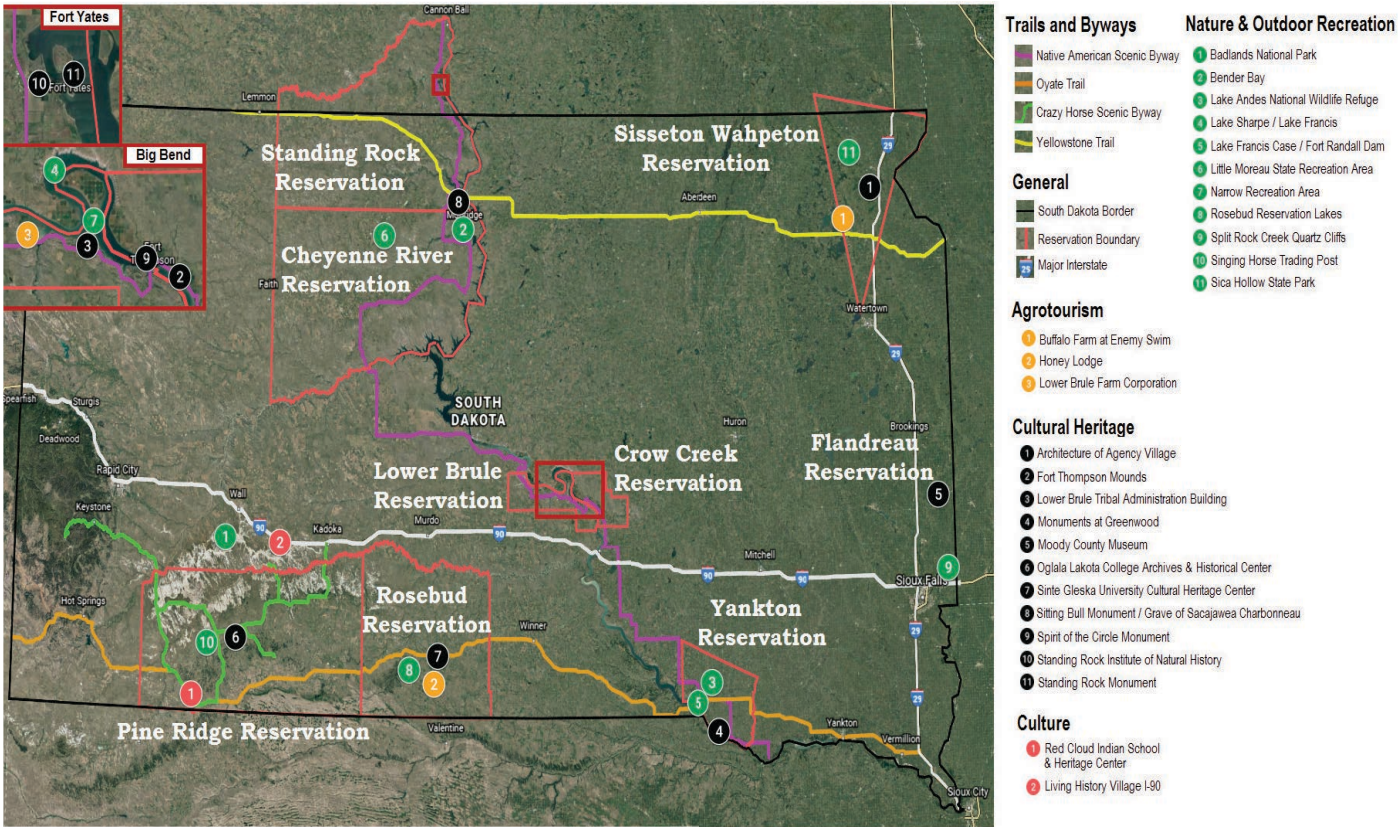
Source: GW International Institute of Tourism Studies

Based on the assessment, off-reservation attractions generally had higher-than-average readiness scores across the Cultural Heritage and Culture categories, demonstrating a higher capacity for visitors. Under the Nature & Outdoor Recreation and Events categories, on-reservation attractions tended toward slightly better average readiness scores than off-reservation attractions in these categories. Across all Tribal Nations and existing attractions off-reservation, the Crazy Horse Memorial near Rapid City scored the highest for Cultural Heritage (89%). For Events, the Lakota National Invitational, held in Rapid City and coordinated with all Tribal Nations, had the highest readiness score (89%). In regards to the Nature & Outdoor Recreation offerings assessed, the Sisseton Wahpeton Oyate's attractions Memorial Park and Sica Hollow scored the highest with 87% and 86% respectively. A detailed analysis of each Tribal Nation's attractions inventory and attractions readiness assessment can be found in the Companion Guides.

Across Tribal Nations in South Dakota, there are many similar attractions and experiences, such as casinos, wacipis, buffalo herds and hunting and fishing. These more common attractions (other than casinos) generally scored very high in the readiness assessment. However, the smaller attractions that are more unique to each Tribal Nation generally scored lower. For example, on the Lower Brule Reservation, the unique Narrows/Big Bend Recreation Area has beautiful hiking trails and an Arikara earthlodge, representing the historic Arikara village site. This unique attraction scored 72% on the readiness assessment, indicating a need for greater product development and promotion of this unique attraction. Figure 8 presents the main attractions along existing main tourism routes in South Dakota.

Although only half of the attractions had online ratings (Tripadvisor, Google, Facebook, Yelp), those that did have ratings were generally moderate, with no quality ratings below 3.3 on a 5-point scale. These findings indicate that there is very limited information available online about existing tourism attractions in Tribal Nations throughout South Dakota.

FIGURE 8: Map of Priority Attractions in Tribal Nations along Tourism Routes



Source: GW International Institute of Tourism Studies

1.3.8 Existing Tourism Routes

South Dakota has a well-maintained system of interstates and highways, making the state ideal for those interested in a classic road trip experience. As seen in Figure 9, travelers can easily cross the state in most any direction, east-west and north-south. With these accessible throughways, various tourism routes have been developed to connect travelers with attractions across the state.

Though most Tribal Nations are not located near one another, the enhancement of existing tourism routes, and the development of new ones, will establish a strong foundational network for the development and management of Native American tourism experiences at priority attractions. This plan proposes the development and utilization of four priority routes:

1. **The Native American Scenic Byway** (NASB) is a popular tourist route which guides visitors through beautiful countryside along the Missouri River, following the famous Lewis and Clark Trail. The NASB runs north to south and connects visitors to many anchor attractions in five reservations: Standing Rock Reservation, Cheyenne River Reservation, Crow Creek Reservation, Lower Brule Reservation, and Yankton Reservation.[34] The Pierre/Fort Pierre area is the most accessible "hub" to the NASB, mostly visited by business travelers, but host to the capital and one of the three major airports.

2. **The Oyate Trail** is a route through southern South Dakota, mainly following 388 miles along Highways SD 50 and U.S. Highway 18. Not as developed or highly traveled as the NASB, the Oyate Trail guides visitors through 21 small towns, showcasing important historical and cultural sites that reflect the Native American and European history of the area.[35] The Oyate Trail connects with an emerging tourism route on the Pine Ridge Reservation known as the Crazy Horse Scenic Byway (CHSB). The CHSB is a proposed circuit which showcases attractions and experiences on the Pine Ridge Reservation. Along with the Oyate Trail, the CHSB is an important corridor to Rapid City and the Black Hills area, a major tourism hub popular for Mount Rushmore, the Crazy Horse Monument, and a range of state parks.[36] The Oyate Trail intersects with the NASB and connects the Yankton Reservation, Rosebud Reservation, and Pine Ridge Reservation



Courtesy of South Dakota Department of Toursim

3. **The Yellowstone Trail** is the northernmost east-west route in South Dakota. The Yellowstone Trail connects travelers from coast to coast across the United States. In the segment traversing South Dakota, visitors will enjoy beautiful scenic views and have access to prime recreation activities.[37] The Yellowstone Trail connects the Lake Traverse Reservation, Standing Rock Reservation, and Cheyenne River Reservation.

4. **Interstate 29**, though not designated as a trail or byway, is an important route connecting travelers to the Tribal Nations in the easternmost part of the state. I-29 runs north-south and connects to the popular Sioux Falls area. I-29 guides travelers along open landscapes passing through the Flandreau and Lake Traverse Reservations. I-29 serves as a convenient connector for visitors to both the Yellowstone and Oyate Trails.

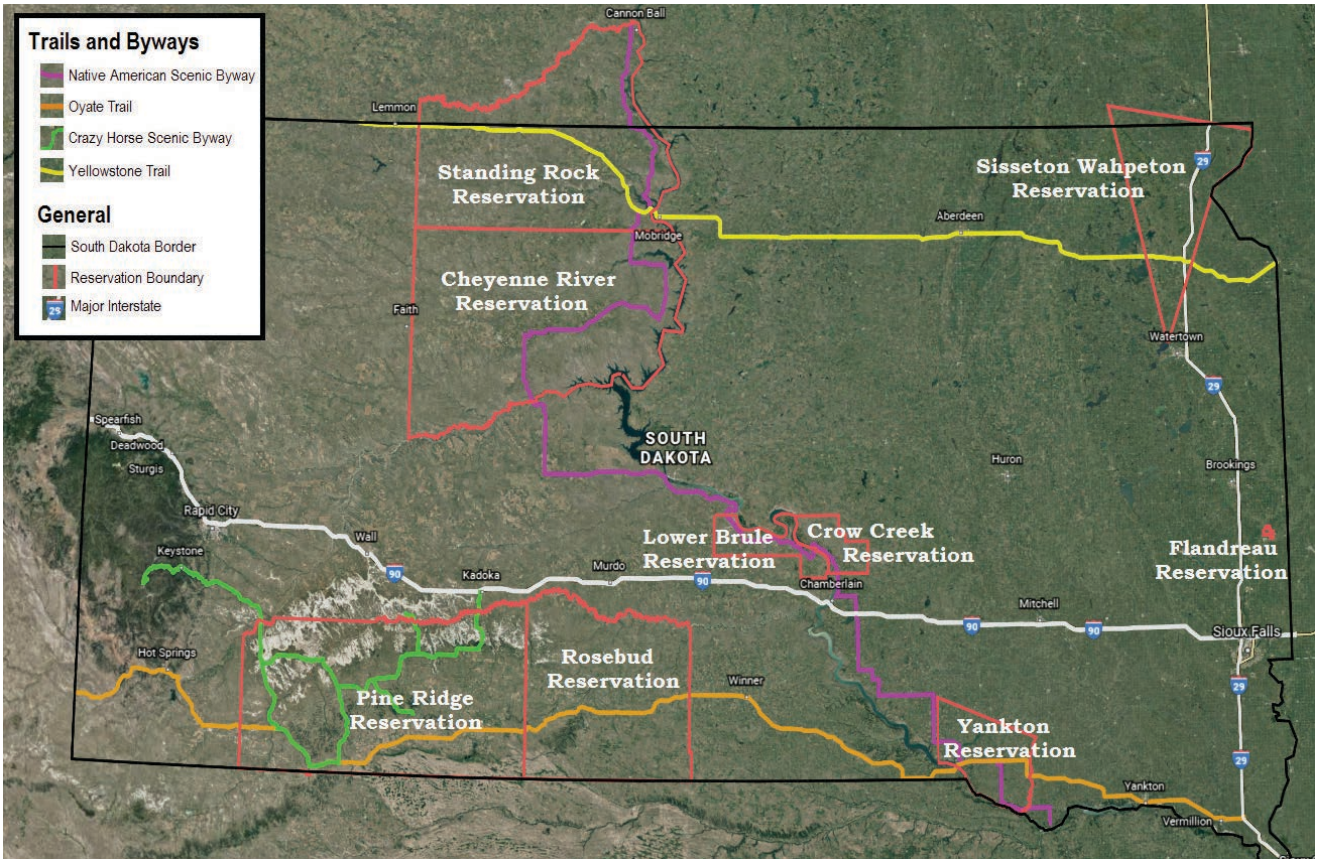
[34] South Dakota Department of Tourism. (2020). The Native American Scenic Byway. Retrieved from https://www.travelsouthdakota.com/trip-ideas/story/native-american-national-and-state-scenic-byway

[35] Oyate Tourism. (2020). Follow the Oyate Trail. Retrieved from https://oyatetourism.com/follow-the-oyate-trail/

[36] Oglala Sioux Tribe Department of Transportation. (2020). The Crazy Horse Scenic Byway Proposal.

[37] South Dakota Department of Tourism. (2020). Black to Yellow. Retrieved from https://blacktoyellow.com

FIGURE 9: Map of Tourism Routes Connecting Tribal Nations in South Dakota



Source: GW International Institute of Tourism Studies

1.4 Accommodations

There are 155 accommodation options in or near Tribal Nations in South Dakota. This section provides more detailed analysis of accommodations options.

1.4.1 Types of Accommodations

Tribal Nations in South Dakota offer a range of accommodation options. Based on desktop research, these include campgrounds, RV parks, cabin shelters, bed-and-breakfast establishments, motels, 1- to 3-star hotels and home-sharing options (usually Airbnb, and referred to as such in the tables).

Table 6 shows that Pine Ridge Reservation and Lake Traverse Reservation have the most accommodation options on tribal lands, and all Tribal Nations have at least ten accommodations options in or within 30 miles of the reservation. Pine Ridge Reservation has 36 accommodation options, Lake Traverse Reservation has 31, and Yankton Reservation has 20 options. Hotels are the most common option, followed by campgrounds.

The price for the accommodation varies depending on the category. Cabin rentals average $125 per night, excluding tax, while a motel or a 1-star hotel will be priced on average at $50 per night. Camping is the most affordable option, with an average one-night cost of $20 for a campsite.

Furthermore, there are eleven casinos located in eight Tribal Nations which offer accommodations. Casinos are an important provider of accommodation services since they usually have the greatest room capacity. Usually, casinos have 50–100 rooms and account for one-quarter of available rooms across all Tribal Nations in South Dakota.[38] Highest occupancy prior to COVID-19 was reported during the summer months, with peak occupancy coinciding with wacipis (powwows), rodeos and other large events.

[38] At the highest estimation the total number of rooms at casinos is roughly 1,100. Based on primary research the total number of rooms across Tribal Nations is around approximately 5,025.

TABLE 6: Accommodation Options Available in Tribal Nations in South Dakota

Tribal Nations	Total Options (within 30 miles)	Breakdown by Type	Total # of Rooms (hotels only)	# with Online Ratings	Average Online Rating (scale 1-5)
Cheyenne River Sioux Tribe	17	1–2 star hotel: 4 Campground: 6 RV Park: 1 Lodge: 3 Airbnb: 3	50	13	4.5
Crow Creek Sioux Tribe	13	2–3 star hotel: 7 Campground: 3 RV park: 2 Airbnb: 1	600	11	4.0
Flandreau Santee Sioux Tribe	10	2-star hotel: 1 B&B: 1 Campground: 3 RV park: 2 Airbnb: 3	125	8	4.5
Lower Brule Sioux Tribe	12	2–3 star hotel: 9 Campground: 1 RV park: 1 Airbnb: 1	600	11	3.9
Oglala Sioux Tribe	36	1–3 star hotel: 6 Campground: 5 B&B: 1 Guest ranch: 2 RV park: 1 Airbnb: 21	1200	20	4.2
Rosebud Sioux Tribe	11	1–3 star hotel: 6 B&B: 1 Campground: 2 RV park: 1 Tipi Stay: 1	600	9	3.6
Sisseton Wahpeton Oyate	31	1–3 star hotel: 7 Campground: 6 RV park: 1 Airbnb: 17	700	14	4.4
Standing Rock Sioux Tribe	17	Resort: 1 1-2 star hotel: 7 Lodge: 1 Cabins: 1 group Campground: 5 RV park: 2	650	21	4.3
Yankton Sioux Tribe	20	1–3 star hotel: 5 Campground: 6 RV park: 1 Airbnb: 8	500	16	3.9

Source: GW International Institute of Tourism Studies

1.4.2 Visitor Satisfaction

Most accomodations in Tribal Nations have a moderate rating from Google (3.5+), which demonstrates a minimally positive experience. Most accommodations fall under the 2-star hotels category, providing basic amenities and services. It is important to note that most of the accommodation options are below 3-star hotels, which shows that Tribal Nations are mainly catering to a low-budget market. There are some Airbnb home-sharing options for most Tribal Nations, but significantly less than for other parts of South Dakota.

Almost all 155 accommodation options assessed had online reviews and ratings. The average online quality rating for accommodations is 3.5 out of 5, which indicates an unremarkable experience.

Furthermore, as can be seen in Table 7, the average market readiness score of all casinos is 60% which indicates a moderate level of satisfaction with accommodation services. The Lode Star Casino in Crow Creek has the highest readiness assessment (73%) but has a low visitor satisfaction rating. These findings indicate the need to improve overall service and quality standards of casinos as important accommodation providers.



Courtesy of South Dakota Department of Toursim

TABLE 7: Casino Market Readiness Assessment Results

Tribal Nations	# of Casinos	Average Readiness Score	% Found Online	% with Online Ratings	Average Online Rating
Cheyenne River Sioux Tribe	0	—	—	—	—
Crow Creek Sioux Tribe	1	73%	100%	100%	3.8 out of 5
Flandreau Santee Sioux Tribe	1	67%	100%	100%	3.5 out of 5
Lower Brule Sioux Tribe	1	69%	100%	100%	4.2 out of 5
Oglala Sioux Tribe	2	60%	100%	100%	3.9 out of 5
Rosebud Sioux Tribe	1	58%	100%	100%	3 out of 5
Sisseton Wahpeton Oyate	2	65%	100%	100%	3.9 out of 5
Standing Rock Sioux Tribe	2	72%	100%	100%	4.9 out of 5
Yankton Sioux Tribe	1	68%	100%	100%	3.7 out of 5
TOTAL	**11**	**60%**	**100%**	**100%**	**3.4 out of 5**

Source: GW International Institute of Tourism Studies



Courtesy of South Dakota Department of Toursim

1.5 Restaurants

Accessibility of diverse food sources and restaurants in and near reservations is identified as a key challenge for most Tribal Nations. There are 84 restaurants in and around Tribal Nations, which generally offer basic bar and dining options for travelers. American standard food is the most popular, with Mexican and Italian restaurants and fast food providing some variety. An overview of restaurants on reservations is shown in Table 8.

There are very few restaurants and no known culinary experiences that allow visitors to learn and appreciate traditional Native American food practices and cuisine. For a tourist, local food is often an integral part of their experience while visiting a destination, and can provide an authentic and engaging way to learn about a new culture and place. For example, Sean Sherman, an Oglala Lakota chef from the Pine Ridge Reservation and currently based in South Minneapolis, is famed for his knowledge of Native American plants and animals and his use of culture and tradition in his culinary creations.

The SD Tourism has existing programs to encourage and support gastronomy and agritourism, for instance farm-to-table concepts, throughout the state, which could present opportunities for Native American entrepreneurs.

Of the 84 restaurant options in or near Tribal Nations, the median online rating is 4.4 on a 5-point scale, which indicates an above-average experience.

Other than the casinos, it is unclear how many accommodations and restaurants are Native American-owned and operated. The limited options and quality of accommodations and restaurants has also been identified as a top challenge by the SDNTA participants and tourism stakeholders. Particularly during large events such as wacipis, it can be very challenging for visitors to find quality accommodations near reservations.

TABLE 8: Restaurant Options: South Dakota Tribal Nations

Tribal Nations	Number within 30 miles	Breakdown by Type	# with Online Ratings	Average Online Rating (scale 1-5)
Cheyenne River Sioux Tribe	12	American: 7 Bakery: 1 Fast Food: 1 Mexican: 1 Native American: 2	6	4.5
Crow Creek Sioux Tribe	7	American: 6 Mexican: 1	7	3.9
Flandreau Santee Sioux Tribe	11	American: 7 Bakery: 2 Fast Food: 1 Mexican: 1	11	4.7
Lower Brule Sioux Tribe	11	American: 6 Chinese: 1 Italian: 2 Japanese: 1 Mexican: 1	11	4.5
Oglala Sioux Tribe	10	American: 6 Fast Food: 1 Grocery: 1 Mexican: 1 Pizza: 1	9	4.5
Rosebud Sioux Tribe	5	American: 3 Pizza: 1 Snack Shop: 1	5	3.9
Sisseton Wahpeton Oyate	9	American: 4 Fast Food: 2 Grocery: 1 Mexican: 2	9	4.4
Standing Rock Sioux Tribe	10	American: 5 Chinese: 1 Coffee Shop: 1 Mexican: 1 Pizza: 1 Sports Bar: 1	10	4.5
Yankton Sioux Tribe	9	American: 6 Bar: 2 Pizza: 1	10	4.5

Source: GW International Institute of Tourism Studies

1.6 Services

In addition to attractions, accommodations, and restaurants, a range of other businesses are essential to support visitor needs, including medical facilities, banks/ATMs, gas stations, public restroom facilities and tour guiding services. Appropriate signage and accessibility to these various facilities and services is important for positive visitor experiences and emergency management.

Table 9 shows that each Tribal Nation has a different range of tourism services and amenities. The Sisseton Wahpeton Oyate have the most medical facilities (7), followed by Lower Brule Sioux Tribe and Cheyenne River Sioux Tribe with 6 each. Flandreau Santee Sioux Tribe and Standing Rock Sioux Tribe have the fewest with just 3 options each. The Yankton Sioux Tribe has the highest number of nearby banks and ATMs. However, the Lower Brule Sioux Tribe has only one bank, and the Crow Creek Sioux Tribe has none.

Considering the complete ecosystem of services in or near Tribal Reservations, Yankton Reservation, Pine Ridge Reservation and Cheyenne River Reservation are the best equipped to meet potential tourism needs, as they each have multiple facilities for each service area needed.

TABLE 9: Tourism Services: South Dakota Tribal Nations

Tribal Nations	Medical Facilities	Banks/ATMs	Gas Stations	Public Restrooms	Guide Services
Cheyenne River Sioux Tribe	6	5/8	5	4	Cultural – 2 Hunting –1
Crow Creek Sioux Tribe	4	0/0	5	1	Cultural – 1 Hunting – 2
Flandreau Santee Sioux Tribe	3	2/4	7	1	Cultural – 1 Hunting – 1
Lower Brule Sioux Tribe	6	1/1	4	1	Cultural – 6 Hunting – 1
Oglala Sioux Tribe	5	3/10	10	2	Cultural – 9 Hunting – 2
Rosebud Sioux Tribe	4	1/7	5	0	Cultural – 2 Hunting – 1 (100+ private guides)
Sisseton Wahpeton Oyate	7	3/5	12	1	Cultural – 3 Hunting – 1
Standing Rock Sioux Tribe	3	3/4	6	0	Cultural – 2 Hunting – 3
Yankton Sioux Tribe	5	5/10	5	8	Cultural – 1 Hunting – 1

Source: GW International Institute of Tourism Studies

1.6.1 Medical Facilities

Having adequate medical facilities to treat residents and visitors is important for tourism. Knowing that there will be a clinic or hospital to help in case of any incidents or medical emergencies will allow visitors to feel safer when visiting the reservations.

While some Native American communities have limited medical facilities on their reservations—mainly health centers and/or clinics—there are hospitals in nearby towns and cities.

The Pine Ridge Reservation has the most medical facilities on the reservation, followed by Cheyenne River Reservation, as seen in Table 10. Pine Ridge and Cheyenne River are larger reservations, and it is beneficial for there to be more medical facilities accessible across their territories.

Most other Reservations have at least one clinic on tribal land, as well as additional health care centers. The Flandreau and Standing Rock Reservations do not have any health centers, but each has a hospital or medical center within 50 miles—some much closer.

The proximity and accessibility of medical facilities is an important aspect of the destination ecosystem, for both visitor medical emergencies and safety management. Additionally, in the new COVID-19 reality, it is increasingly important to travelers to have medical facilities nearby in case they need testing or medical treatment.

TABLE 10: Medical Facilities: South Dakota Tribal Nations

Tribal Nations	Medical Facilities	Distance to Reservation
Cheyenne River Sioux Tribe	1. USPHS Indian Health Service Hospital 2. Upell Medical Clinic - Eagle Butte 3. West Dakota Health Center 4. Faith Community Health Center 5. Mobridge Medical Clinic 6. Family Health Care – Eagle Butte	On Reservation On Reservation On Reservation On Reservation 4.1 miles 14.8 miles 72 miles
Crow Creek Sioux Tribe	1. Fort Thompson Community Health Center 2. Avera Weskota Memorial Hospital 3. Dakota Family Medical Center - Chamberlain 4. Sanford Chamberlain Medical Center	On Reservation 27.8 miles 10.6 miles 12.7 miles
Flandreau Santee Sioux Tribe	1. Madison Regional Health System 2. Brookings Health System 3. Sanford Health Hartford Clinic	31.4 miles 23.5 miles 48.5 miles
Lower Brule Sioux Tribe	1. IHS Health Center 2. Lower Brule Indian Health Center 3. Kennebec Clinic 4. Stanley Jones Memorial Clinic 5. Dakota Family Medical Center - Chamberlain 6. Sanford Chamberlain Medical Center	On Reservation On Reservation 7.9 miles 19.2 miles 25.6 miles 30 miles
Oglala Sioux Tribe	1. Kyle Health Center 2. Pine Ridge Hospital 3. Wanblee Public Health Center 4. Bennett County Hospital 5. Black Hills Health Care System	On Reservation On Reservation On Reservation On Reservation 35.1 miles
Rosebud Sioux Tribe	1. Mission VA Clinic 2. Rosebud Comprehensive Health Care Facility 3. Winner Regional Hospital 4. Avera Gregory Hospital	On Reservation On Reservation 18.5 miles 43.8 miles
Sisseton Wahpeton Oyate	1. Coteau Health Care System Hospital 2. Indian Health Services (IHS) 3. Sanford Wheaton Medical Center 4. Sanford Webster Medical Center 5. Marshall County Healthcare Center 6. Essentia Health-Holy Trinity Hospital 7. Ortonville Area Health Services	On Reservation On Reservation 8.1 miles 10.7 miles 17.4 miles 23.2 miles 30.5 miles
Standing Rock Sioux Tribe	1. Mobridge Regional Hospital & Clinics 2. Bowdle Hospital 3. Bison Clinic	2.3 miles 46.8 miles 51.1 miles
Yankton Sioux Tribe	1. Wagner Indian Health Services Clinic 2. Wagner Community Memorial Hospital 3. Douglas County Memorial Hospital 4. St. Michael's Hospital 5. Landmann-Jungman Memorial Hospital	On Reservation On Reservation 3.8 miles 13.2 miles 19.1 miles

Source: GW International Institute of Tourism Studies

1.6.2 Banking

Commerce on Tribal Reservations is mainly cash-based. Service providers such as small restaurants, tour guides and artisans may only accept payments in cash. Visitors therefore need access to cash machines on the reservations.

Pine Ridge, Cheyenne River and Yankton Reservations have the most ATMs accessible to visitors on the reservations, as seen in Table 11. Crow Creek Sioux Tribe does not have any banks or ATMs on the reservation, and the Lower Brule Reservation only has one Wells Fargo branch. However, both reservations are near Chamberlain and the Pierre/Fort Pierre area, where there are many banking facilities. Outside the reservations, there are 541 banks in 172 different cities in South Dakota, with over 100 branches in Sioux Falls. Wells Fargo operates 39 branches; other popular regional banks such as Great Western, CorTrust and Dacotah have over 20 branches collectively.

TABLE 11: Banks and ATMs on Reservations

Tribal Nations	Banks	Number of ATMs
Cheyenne River Sioux Tribe	1. State Bank of Eagle Butte 2. Western Dakota Bank (3 branches) 3. Black Hills Credit Union 4. 1st Financial Bank USA 5. First National Bank in Phillip	8
Crow Creek Sioux Tribe	~	0
Flandreau Santee Sioux Tribe	1. First Savings Bank 2. Farmers State Bank	4
Lower Brule Sioux Tribe	1. Wells Fargo	1
Oglala Sioux Tribe	1. Lakota Federal Credit Union 2. Daycia Inc 3. Eagle Rock Funding	10
Rosebud Sioux Tribe	1. Wells Fargo	7
Pine Ridge Sioux Tribe	1. Daycia Inc 2. Indian Affairs IIM Bank 3. Lakota Federal Credit Union 4. Security First Bank	
Sisseton Wahpeton Oyate	1. Wells Fargo 2. First National Bank 3. Dakotah Bank	5
Standing Rock Sioux Tribe	1. First National Bank in Phillip 2. Wells Fargo 3. Great Western Bank	4
Yankton Sioux Tribe	1. First Dakota National Bank 2. Commercial State Bank 3. Community Bank 4. Andes State Bank 5. First Savings Bank	10

Source: GW International Institute of Tourism Studies



Courtesy of South Dakota Department of Toursim

1.6.3 Gas Stations

South Dakota is a generally accessible state, with road systems and gas stations available in most areas. Unfortunately, Tribal Reservations have fewer gas station facilities compared to other areas of South Dakota. Given the long distances between reservations and other towns, it can be a challenge for tour operators and independent travelers to travel with confidence. Gas stations also serve as an important vendor for food and Native American art.

All nine Tribal Nations have at least some gas stations nearby. The Lake Traverse Reservation has the most, and the Lower Brule Reservation the fewest. However, the operationality of these gas stations is unclear. Referring back to Table 9, the Lake Traverse Reservation has twelve gas stations within its territory and most other Tribal Nations have at least five to service their areas. The availability and signage for these gas stations is not known, and SDNTA members have flagged this as a challenge to address.

1.6.4 Public Spaces and Restroom Facilities

The attractiveness of a Tribal Reservation can influence the visitor experience. Public spaces and facilities play an important role in the comfort and enjoyment of a place. Tribal Nations in South Dakota are known to have ample natural attractions and outdoor recreation opportunities. Additionally, many of the Tribal Nations have unique and culturally significant architecture, such as the Lower Brule Administrative Building, or the Song to the Great Spirit Building on the Lake Traverse Reservation.

Tribal Nations need funding for public maintenance and regular clean-up after storms. Furthermore, not all Tribal Nations have public restrooms available. The SDNTA has identified the lack of public restrooms as an important issue to address while developing tourism opportunities on reservations. As seen in Table 9, Cheyenne River and Yankton Reservations have the highest number of public restrooms. Most other reservations have only one, and the Rosebud and Standing Rock Reservations have none.

1.6.5 Tour Guides

All nine Tribal Nations provide guiding services. According to SDNTA participants, there are at least 40 guiding service providers (27 cultural and 13 hunting) across the nine Tribal Nations, as seen in Table 9.

The majority of cultural tour providers are located in Pine Ridge Reservation (9) and Lower Brule Reservation (6). However, very few cultural tour guide services are provided by registered tour operators. Within the Tribal Nations, Tatanka Rez Tours, located in the Pine Ridge Reservation, is the only Native American-owned and operated tour company registered with the state of South Dakota. Most all other cultural tour guides provide tours informally. Other outside trusted tour operators such as South Dakota Missouri River Tourism provide customized tours of reservations along the Missouri River—Standing Rock, Cheyenne River, Lower Brule, Crow Creek, and Yankton Reservations—and of Rosebud Reservation. The easiest way for a visitor to contact a cultural tour guide is either through the Tribal Nation website or through SD Tourism or Missouri River Tourism.

All nine Tribal Nations have active hunting and fishing guide services. There are hundreds of hunting and fishing guides available across the nine reservations, which can be contacted through one of the 13 service providers. For hunting and fishing guides, the "service provider" is most often the designated Tribal parks and wildlife department. Though all nine Tribal Nations are known for exceptional hunting and fishing, the Rosebud Reservation and surrounding tribal lands have the largest number of private hunting guides available for interested visitors. The Rosebud Sioux Tribe Game, Fish, and Parks Department lists 100 available private tour guides.[39]

[37] Rosebud Sioux Tribe Game, Fish & Parks Department (2020). Hunting Guides. Retrieved from http://www.rstgfp.net/guides/?&offset=90

1.6.6 Shopping

Gift shops in museums, visitor centers, and casinos are the primary distribution and sales points for Native American arts and crafts. Some vendors also sell Native American goods in various gas stations. Artisans also sell their products at wacipis and fairs, and increasingly online. Popular Native American goods include: art, books, music, drums, jewelry, quilts, dream-catchers, pipes, regalia, moccasins, and botanical herbs/medicine.

Table 12 lists the 40 main shopping outlets for Native American arts and crafts on Tribal Reservations. The Pine Ridge and Standing Rock Reservations have the most outlets with ten and six respectively. All other Tribal Nations have at least two outlets. A complete list of shopping options available in each Tribal Nation can be found in the companion guide to this plan which includes each Tribal Nation's Product Profile.

TABLE 12: Native American Art and Crafts Shopping Options by Tribal Nation

Tribal Nations	Locations
Cheyenne River Sioux Tribe	1. Timber Lake & Area Museum and Gift Shop 2. H.V. Johnson Cultural Center & Gift Shop 3. Cheyenne River Youth Project 4. Eagle Butte Gift Shop 5. E.B Keya Cafe & Gift Shop
Crow Creek Sioux Tribe	1. Lode Star Casino 2. Kosters Wood Krafts 3. Mystic Horse Art Studio 4. Natalie Voice's Star Quilts 5. Patty's Star Quilts
Flandreau Santee Sioux Tribe	1. Royal River Casino 2. Moody Museum 3. Four Winds Cultural Center
Lower Brule Sioux Tribe	1. Lower Brule Administrative Building Gift Shop 2. Golden Buffalo Casino
Oglala Sioux Tribe	1. Prairie Wind Casino 2. RCIS Heritage Center 3. White River Visitor Center 4. Badlands Quilting 5. First Peoples Fund Art Space 6. Singing Horse Trading Post 7. Pine Ridge Visitor Center 8. Lil Angel's Store 9. Batesland Handi Shop 10. Wounded Knee Site
Rosebud Sioux Tribe	1. Sinte Gleska University Cultural Heritage Center 2. Rosebud Casino 3. St. Francis Mission Buechel Museum 4. Honey Lodge
Sisseton Wahpeton Oyate	1. Sisseton Wahpeton Administrative Building 2. Dakota Sioux Casino 3. Dakota Magic Casino
Standing Rock Sioux Tribe	1. Grand River Casino & Resort and The Bay 2. Prairie Knights Casino & Resort 3. Sitting Bull College Gift Shop 4. Standing Rock Museum of Natural History 5. Mobridge Visitor Center 6. Klein Museum
Yankton Sioux Tribe	1. Fort Randall Casino & Hotel 2. Fort Randall Dam Visitor Center

Source: Google, South Dakota Department of Tourism

As seen in Table 13, there are 18 stores that sell Native American products outside Tribal Reservations. This demonstrates the opportunity for more outlets to be developed on reservations, either within existing attractions or in new shopping areas. These outlets are mostly located in popular tourism hubs in Rapid City and in towns along the Missouri River.

Geographic isolation and lack of business training have been key challenges faced by Native American artists and artisans hoping to make a viable living from their crafts. Various organizations have stepped up to provide solutions to these challenges. For example, the First Peoples Fund has launched the Rolling Rez mobile art unit, to help artists access distribution channels outside of the reservation. Rolling Rez Arts serves as a traveling art space, business education center, and mobile bank. Along with being a distribution channel, it offers classes, workshops, and training to help artists market and sell their work outside of the Tribal Nation.[40]

The COVID-19 pandemic has severely impacted in-person sales of Native American goods, with many organizations and businesses switching their focus to online sales to support artisans. Some of these organizations include the Dakota Indian Foundation, the Heritage Center at Red Cloud Indian School, and Prairie Edge & Sioux Trading Post.

There is a need to make more meaningful connections between the Native American creative and arts industry and tourism in South Dakota in a way that ensures benefits to artisans and their local communities. Some ideas include creating open-air markets and artisan co-ops, and improving linkages with high-traffic tourism areas in the Black Hills and Sioux Falls.

TABLE 13: Native Goods Shopping Options Off-Reservation in South Dakota

Region	Shopping Options
Western	1. Crazy Horse Memorial (Rapid City) 2. The Journey Museum (Rapid City) 3. Prairie Edge Trading Co Galleries & Trading Post (Rapid City) 4. Sioux Pottery (Rapid City) 5. Racing Magpie (Rapid City) 6. Wounded Knee Museum (Wall) 7. Newell Museum (Newell)
Central	8. Akta Lakota Museum & Cultural Center (Chamberlain) 9. Dakota Plains Gallery & Gift Shop (Chamberlain) 10. Cultural Heritage Center (Pierre) 11. Dakota Emporium (Fort Pierre) 12. Oahe Visitor Center (Pierre) 13. Casey Tibbs Sd Rodeo Center (Fort Pierre) 14. Klein Museum (Mobridge) 15. Major James McLaughlin Heritage Center (McLaughlin)
Eastern	16. Clear Lake Museum (Clear Lake) 17. Lake Poinsett Visitor Center and Museum (Alrington) 18. W.H. Over Museum (Vermillion)

Source: Google, South Dakota Department of Tourism

[40] Armstrong, Annie. (2017). How Native American Artists Are Getting the Market Boost They Need. Retreived from https://www.artsy.net/article/artsy-editorial-native-american-artists-market-boost

1.7 Infrastructure

The hard infrastructure in a destination provides access for visitors, ensures their experience runs smoothly, and makes it more likely they will choose to visit again.

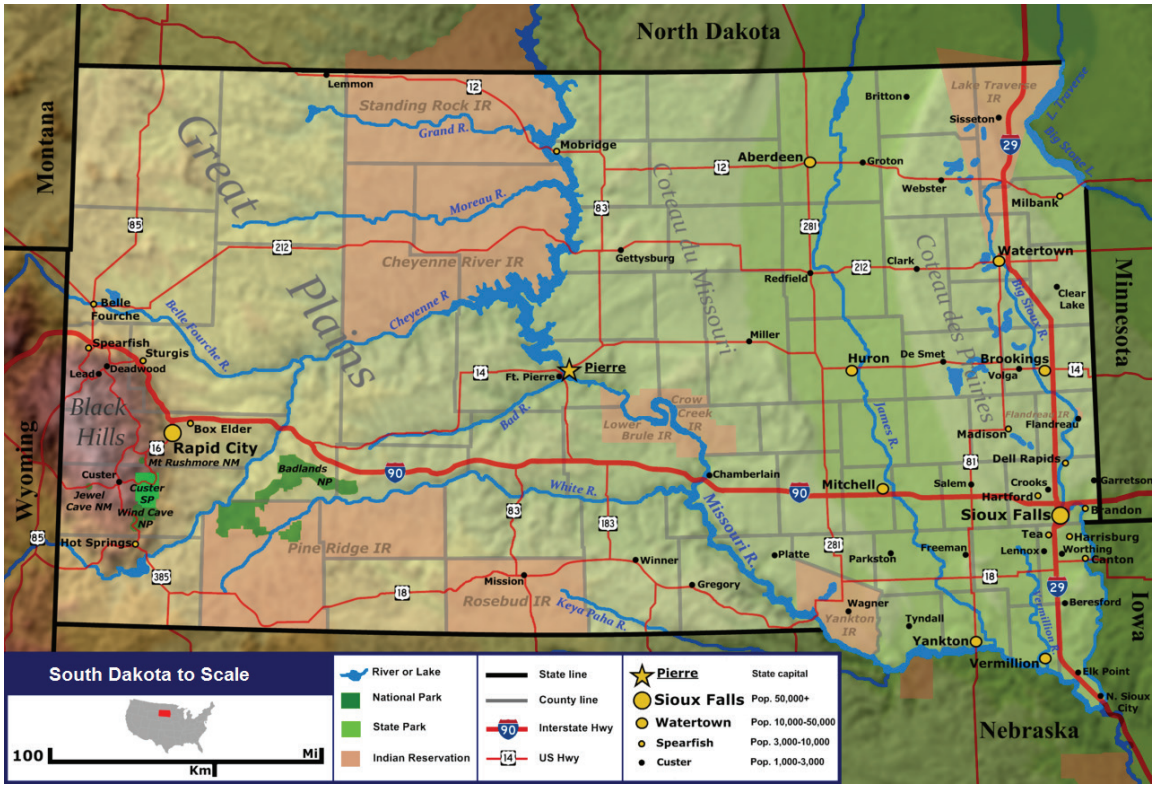
Following are the key takeaways from this section:

- Most of the reservations are far from major cities, and roads into and on tribal lands are of poor quality, creating access problems for visitors.
- Each Tribal Nation has broadband access, 4G LTE mobile coverage, and energy and water systems in place; the greatest issue remaining is the lack of mobile coverage on roads within the reservations.
- All Tribal Nations can be accessed via the state and federal highway systems; many are also on routes to other major tourist attractions.

1.7.1 Roads and Wayfinding

South Dakota has an extensive road system, totaling 98,268 miles (157,229 km): 74,707.05 miles of rural and county pathways and 23,561 miles of main county highways. These numbers do not include the interstate highway system[41] in South Dakota—678,31 miles long—or the U.S. highway system. Across the state, there are four interstate highways: I-29 and I-229 running north-south, and I-90, and I-190 running east-west. There are 14 U.S. numbered highways running through the state, as well as dozens of state-owned highways. The construction and maintenance of roads in South Dakota falls to the Department of Transportation, which also maintains the interstate highway system and the U.S. highway system, although these roads are federal property.[42] Additionally, while the I-94 crosses North Dakota (east-west), it also serves as an important route to access the South Dakota Tribal Nations.

FIGURE 10: Official Map of the Road Network in South Dakota[43]



Source: Created by Jon Platek with National Atlas Data

[41] South Dakota Department of Transportation (2019). 2019 Mileage Reports - Primary County Highway System Mileage by Surface Type. Retrieved from https://dot.sd.gov/projects-studies/planning/non-state-public-road-inventory

[42] ibid.

[43] South Dakota Department of Transportation. (n.d). Official State Highway Map. Retrieved from https://catalog.data.gov/dataset/national-atlas-of-the-united-states

There are three high-priority routes that are pivotal for connecting multiple cities across the state. Interstate 29, which begins in Kansas City, Missouri, runs north toward Canada, and cuts across the eastern part of the state through Sioux Falls. U.S. Highway 85 joins Rapid City in the west to Interstate 25, connecting to Denver, Colorado. Finally, the Theodore Roosevelt Expressway begins in Rapid City and runs north through North Dakota and Montana to the Canadian border. South Dakota's highway infrastructure is ranked third in the nation for highway performance and cost-effectiveness; residents and visitors benefit from low congestion, quality road maintenance, and short commute times.

Within the boundaries of Tribal Nations, the BIA is responsible for the upkeep of road networks. In 1983, the BIA signed an MOU with the U.S. Department of Transportation, to work together to guide the use of federal funds to construct and maintain roads on tribal lands; the FHWA Office of Tribal Transportation coordinates with the DOT on this matter.

The BIA manages the inventory of roads under the Tribal Transportation Program (TTP), formerly known as the Indian Reservations Roads program. BIA roads are owned by the Tribal Nations with right-of-way under the BIA, and are eligible for federal funding through the BIA and FHWA. Federal and state funding is established under 23 USC 209(a)(9). The BIA maintains 29,000 miles of roads across the United States, however not all of these roads meet minimum standards, and some are unpaved. Dirt roads aren't that uncommon in the country. Of the 29,000 miles managed, only 17% are considered to be in acceptable condition.[44]

When visiting Tribal Nations, most tourists arrive in their own vehicles, meaning the road system is an essential part of their experience. I-90 and I-29 provide critical access points to eight of the nine reservations, with I-94 providing access to Standing Rock Reservation. One of the critical areas of concern for tourism development is the access roads to attractions and sites in Tribal Nations.

Wayfinding and signage is fundamental to any road system—without it, visitors easily become lost. The number of signs directing tourists to South Dakota reservations is unknown, but discussions with SDNTA have made it clear that existing signage is inadequate for tourism purposes.

TABLE 14: Main Access Roads for Tribal Nations in South Dakota

Tribal Nations	Interstate	U.S. Highway	SD State Road	BIA
Cheyenne River Sioux Tribe	I-90	U.S. 212	SD 20, SD 63, SD 65	BIA 4, BIA 5, BIA 6, BIA 7, BIA 8
Crow Creek Sioux Tribe	I-90	U.S. 14	SD 34, SD 47, SD 50	BIA 4
Flandreau Santee Sioux Tribe	I-29	—	SD 13, SD 32, SD 34	—
Lower Brule Sioux Tribe	I-90	U.S. 83	SD 34, SD 47, SD 1806	BIA 10
Oglala Sioux Tribe	I-90	U.S. 18	SD 40, SD 44, SD 73	BIA 2, BIA 28, BIA 32, BIA 33, BIA 47
Rosebud Sioux Tribe	I-90	U.S. 18, U.S. 83	SD 63	—
Sisseton Wahpeton Oyate	I-29	U.S. 12	SD 10, SD 20	
Standing Rock Sioux Tribe	I-94*, I-90	U.S. 12	SD 63, SD 65, SD 80	BIA 4, BIA 21
Yankton Sioux Tribe	I-90	U.S. 18	SD 44, SD 46, SD 50	

* I-94 crosses North Dakota

Source: GW International Institute of Tourism Studies

[44] Bureau of Indian Affairs, Division of Transportation (2012). Operation and Maintenance. Retrieved from https://www.bia.gov/bia/ois/division-transportation/operations

Signage in the United States is governed by the FHWA *Manual on Uniform Traffic Control Devices* (MUTCD).[45] While Tribal Nations are sovereign, all signage on roads funded by the federal and state governments must abide by MUTCD standards. Tribal Nations are free to conceptualize and implement their own road signs as long as they abide by these standards on federal- and State- funded roads.

Some states and territories choose to deviate from the federal standard. For example, Hawaii has dual metric and Imperial distances; these signs were introduced in response to the high influx of Japanese tourists and the influence of Pacific markets. Most signs in Puerto Rico use metric distances and are posted in Spanish and English, reflecting its strong Spanish heritage.

The use of Native American languages on signage can promote Tribal culture through coding and symbology. The NATIVE Act of 2016 suggests the use of Native American languages on new road signs to "share local Native American heritage."[46] Some Tribal Nations have made agreements with the state to implement their own language and symbols on their signage (see the case study below). This could be another way for Tribal Nations to welcome tourism.

1.7.2 Airports

South Dakota has 71 public airports under the administration of the Office of Aeronautics Services. The five main commercial airports are Aberdeen Regional, Rapid City Regional, Sioux Falls Regional, Pierre Regional, and Watertown Regional (see Table 15). There are five airports on tribal lands. Rosebud Sioux Tribal Airport (Rosebud), Pine Ridge Airport, Isabel Municipal Airport (Cheyenne River), Sisseton Wahpeton Municipal Airport, and Big Bend Landing Strip (Crow Creek). Specific information on the operation of these airports cannot be found, yet they present an opportunity to bring high-spending tourists into the tribal lands, as they are equipped to receive small aircrafts—including private jets. For example, Rosebud Airport has a 4,800-foot (1,463-meter) runway.

Due to the great distances between South Dakota cities, air transportation is a very attractive option for long distances. However, flying into South Dakota might be seen as an impediment for prospective travelers, as the price charged by air carriers is above the national average.

Figure 11: Case Study: U.S. Route 86 – New York State[47]

The Seneca, Onondaga and Tuscarora Tribes signed an agreement with the State of New York to implement road signs in both English and their respective languages.

"Language is integral to Native culture, history and future. Signage is one facet or tool in preserving language as well as to educate the public and acknowledge Tribe's connection to the land as well as their sovereignty as nations across the country."

– Jessica Robinson, deputy director of the Seneca Nation of Indians Department of Transportation.





[45] The United States of America has followed the MUTCD standard since 1935 with the latest version issued in 2009, and has not adopted the Vienna Convention on Road Signs, mainly used in Europe. States are free to adopt complementary annexes to suit local laws and customs, but must adhere to the basics of the MUTCD under the penalty of a 10% reduction in Federal funding.

[46] 25 U.S. Code § 4353(c)(1)(h)

[47] Figura, D. (2016): Bilingual road signs: Growing trend on state roads crossing Indian lands. Retrieved from https://www.newyorkupstate.com/news/2016/10/bilingual_road_signs_growing_trend_on_state_roads_crossing_indian_land.html

TABLE 15: Main Airports in South Dakota (with cities and nearby roads)

Name	Surface	Owner	Passengers (FAA, 2018)	Closest Reservation	Roads Served	Carriers	Top 3 Originating Airports
Aberdeen Regional – ABR	Asphalt	City of Aberdeen	28,404	Sisseton Wahpeton: 77 mi	U.S. 12, U.S. 281	1	Minneapolis, MN
Rapid City Regional – RAP	Concrete Asphalt	City of Rapid City	303,471	Pine Ridge: 40 mi	SD 44	6	Minneapolis, MN Denver, CO Dallas, TX
Sioux Falls Regional – FSD	Concrete	City of Sioux Falls	529,895	Yankton: 100 mi	I-29, I-90	7	Minneapolis, MN Denver, CO Dallas, TX
Pierre Regional – PIR	Asphalt	City of Pierre	30,124	Crow Creek: 22 mi Lower Brule: 22 mi	U.S. 14	2	Denver, CO Watertown, SD
Watertown Regional – ATY	Concrete	City of Watertown	12,064	Sisseton Wahpeton: 5 mi	SD 20	1	Chicago, IL Denver, CO Pierre, SD

Source: GW International Institute of Tourism Studies

1.7.3 Telecommunications

While developments have been made in broadband deployment on tribal lands, disparities remain. At the federal level, 98% of non-Tribal urban centers are covered by standard 25/3 Mbps (25 megabits per second download, 3 upload) Internet access, while only 92% of Tribal urban centers are covered by the same standard, and only 46.6% of rural areas in the Tribal Nations have access to this technology.[48] Additionally, 96% of the population on tribal lands in the U.S. is covered by at least one mobile broadband provider, compared to 99.6% in the remaining parts of the U.S. In terms of road coverage, 86% of Tribal roads are covered by 4G LTE, while 94% of non-Tribal roads are.

As seen in Table 16, all South Dakota Tribal Nations have reliable access to relatively fast Internet speeds, above the Federal Communications Commission (FCC) standard of 25/3 Mbps. Optical fiber and cable technologies (which can carry more data) are widespread in the urban areas. In rural areas, DSL technology is more prevalent with lower speeds—some areas still use dial-up connections (up to 56 Kbps). However, where higher speed access is not available, 4G LTE connections compensate for this bottleneck with reliable access to these technologies. Access to the Internet on the roads in South Dakota Tribal Nations remains the main point of concern. As mentioned above, only 86% of Tribal roads in the U.S. are covered by 4G LTE, exposing locals and potential tourists to older standards such as 3G, slower mobile service, and analog signals. Some areas are in "dead zones" with no access at all. Access to 4G LTE technology along the roads is fundamental not only for emergency services, but also for map-finding and real-time GPS directions.

To better coordinate the development efforts of these technologies on tribal lands, the FCC established the Office of Native Affairs and Policy (ONAP) and has visited South Dakota in recent years. In August 2019, the FCC authorized grants to provide broadband in 40,000 tribal homes and businesses—12,500 of them in South Dakota. Companies receiving these grants will have to guarantee affordable access to the standard 25/3 Mbps Internet connection.

At the state level, the South Dakota Telecommunications Association (SDTA) comprises small, medium, municipal and Tribal telecommunication companies who provide broadband to three-quarters of South Dakota. Due to the state's large size, larger operators (i.e., AT&T) do not invest in rural areas, as their return on investment would be severely limited compared to the cost of installing and maintaining

[48] Federal Communications Commission. (2018). Report on Broadband Deployment in Indian Country, Pursuant to the Repack Airwaves Yielding Better Access for Users of Modern Services Act of 2018. Retrieved from https://www.fcc.gov/document/report-broadband-deployment-indian-country

communication equipment. The state also provides grants to Internet service providers (ISPs); in 2019, Governor Kristi Noem authorized $5 million to be divided by eight companies—one of them the Cheyenne River Sioux Tribe Telephone Authority. Due to cost, the deployment of optical fiber is disproportionately low in rural areas—it costs $25 per resident in Sioux Falls, but $3,571 per resident in rural South Dakota (SD Dashboard, 2018).

The lack of technological infrastructure is a serious bottleneck for tourism businesses, as their communication ability is limited; this impairs their marketing efforts and connection with customers compared to similar businesses in non-Tribal areas. Additionally, as so much of the tourism booking process is now completed online, all tourism businesses must be equipped with reliable and constant access to the Internet.

TABLE 16: Best Main Broadband Access Available in Tribal Nations[49]

Tribal Nation	Landline						Mobile		
	Number of ISPs		Technology	Max. Speeds (Mbps)		Tribal Provider	Number of Providers	Tech	Max. Speeds (Mbps)
	Residential	Business		Residential	Business				
Cheyenne River Sioux Tribe	10	1	Fiber – DSL – Satellite	100	1000	CRSTTA	2	4G LTE	10
Crow Creek Sioux Tribe	5	1	Fiber – DSL – Satellite	100	1000	NAT	2	4G LTE	10
Flandreau Santee Sioux Tribe	7	3	Cable – Fiber – DSL – Satellite	200	1000	N/A	3	4G LTE	10
Lower Brule Sioux Tribe	7	3	Cable – Fiber – DSL – Satellite	1000	1000	N/A	2	4G LTE	10
Oglala Sioux Tribe	4	1	Cable – Fiber – DSL – Satellite	100	100	NAT	2	4G LTE	10
Rosebud Sioux Tribe	3	1	Fiber – DSL – Satellite	100	72	N/A	2	4G LTE	10
Sisseton Wahpeton Oyate	5	1	Fiber – DSL – Satellite	1000	1000	N/A	2	4G LTE	10
Standing Rock Sioux Tribe	3	1	Dial Up – DSL – Satellite	40	3	N/A	2	4G LTE	10
Yankton Sioux Tribe	6	3	Cable – Fiber – DSL – Satellite	1000	1000	N/A	2	4G LTE	10

Source: Federal Communications Commission

[49] Mbps: megabits per second. ISP: Internet Service Provider. DSL: Digital Subscriber Line—high-speed Internet over classic copper landline. 4G: Fourth Generation mobile service. LTE: Long-Term Evolution—newer standard for 4G connectivity.

1.8 Enabling Environment

Tribal governments play a critical role in creating a positive, enabling environment and enabling conditions for tourism development.

- Enabling environment: creating a positive business environment for tourism enterprises; ensuring safety and security of residents and visitors; ensuring health and hygiene; developing human resources; and improving information communication and technology readiness.
- Tourism policies and enabling conditions: establishing adequate governance of tourism; government prioritization of tourism, i.e., political will to support tourism development and investments in infrastructure; and facilitating tourism planning and strategies.
- Infrastructure: providing ground infrastructure; and tourist service infrastructure.

While Tribal governments play a critical role in enabling tourism development, it is important to underscore that tourism is everyone's business. Creating a positive policy environment and improving infrastructure is a multifaceted undertaking that benefits multiple sectors—including but not limited to tourism, agriculture, and construction—and results in added investments in communities. Given the interlinkages with different sectors and tourism's cross-cutting impacts throughout the local economy, no single government agency or entity can do it alone. Successful tourism development requires intergovernmental coordination and multistakeholder collaboration, i.e., collaboration between Tribal government, private sector, community leaders, nongovernmental organizations and state and federal level partners.

Tribal Nations in South Dakota currently do not have an enabling environment for tourism development, nor do they have optimal requisite infrastructure. However, there is growing commitment within Native American communities to advocate for prioritization of tourism as a strategy for local economic development.

This section of the situation analysis presents the main findings associated with tourism governance in Tribal Nations, their tourism policies related to tourism taxes, ease of doing business, human resource development, and safety and security.

The main takeaways for this section are:

- While there is support from community members and leaders to prioritize tourism as a strategy for local economic development, more tourism awareness and educational programs are needed to broaden support for tourism within Tribal Nations.
- Presidents and Chairmen of Tribal Councils have expressed their interest in supporting tourism development but they struggle to prioritize it in context of other pressing public health, housing and food security issues. More advocacy and tourism awareness raising efforts are needed for Tribal governments to prioritize tourism.
- Tourism contributes to Tribal governments through various taxes (tourism tax, sales tax, gas tax, and the sale of hunting and fishing licences). Awareness of the tourism tax in Tribal Nations is quite low and its collection, reporting and enforcement are quite variable among Tribal Nations, which all have different tourism tax arrangements. There is an opportunity to normalize the tourism tax so that as tourism grows, so does tourism tax revenue. This revenue can be used to fund tourism priorities.
- While there are some sources of public and private funding for Native American tourism businesses in South Dakota, there are systemic bottlenecks that preclude adequate and affordable financing for Native American tourism entrepreneurs.



Courtesy of South Dakota Department of Toursim

1.8.1 Tourism Governance

While developments have been made in broadband Tribal Nations in South Dakota are sovereign nations with unique constitutions, governments and judicial structures.

Since tourism is nascent in Native American communities in South Dakota, Tribal Nations do not have tourism departments dedicated to the planning, development and management of tourism. The Oglala Sioux Tribe, Sisseton Wahpeton Oyate, and Standing Rock Sioux Tribe are in the early stages of establishing tourism offices.

In response to the current situation, SDNTA participants have identified the pressing need to engage Tribal government and community leaders to better understand the potential of tourism as a key driver of socioeconomic development. The various Tribal government leaders that have participated in the SDNTA meetings through which this plan was developed, and have expressed strong support to explore tourism as a way to contribute to local economies, including workforce development and greater entrepreneurship and job creation opportunities.

Within the current structure of Tribal governments in South Dakota there are several public entities that have important linkages to tourism development, especially since there are no existing tourism offices in Tribal Nations. These entities fall under four main categories:

- Cultural Preservation
- Parks, Recreation and Natural Resource Management
- Economic Development & Planning
- Revenue Departments

Table 17 provides a snapshot of the relevant public entities that can support tourism development in each Tribal Nation. Economic development and planning departments can ensure integration and prioritization of tourism in the Tribal Nation's economic development plans. Cultural preservation departments and parks, recreation and natural resource management departments may manage important visitor attractions and sites and can guide tourism product development as well as codes of conduct for tour operators and visitors. And revenue departments play an important role in ensuring compliance with existing laws and regulations that can provide a stable revenue stream from tourism activities.

Currently, there is a very limited understanding among these public agencies of their linkages to tourism. Targeted efforts will be needed to integrate all these government agencies into the SDNTA to facilitate the intragovernmental coordination and collaboration needed for tourism development.

TABLE 17: Tribal Government Entities That Interlink with Tourism

Tribal Nation	Departments Relative to Tourism			
	Cultural Preservation	Parks, Recreation, and Natural Resource Management	Economic Development & Planning	Revenue
Cheyenne River Sioux Tribe	THPO	Game, Fish & Parks	Planning Department	Revenue Office
Crow Creek Sioux Tribe	THPO	Wildlife Department	N/A	N/A
Flandreau Santee Sioux Tribe	THPO	Natural Resources	Economic Development	n/a
Lower Brule Sioux Tribe	THPO	Wildlife, Fish and Recreation; Environmental Protection Office	N/A	N/A
Oglala Sioux Tribe	THPO	Parks and Recreation Natural Resources, EPA	Office of Economic Development	Revenue Department
Rosebud Sioux Tribe	THPO	Natural Resources and Game, Fish, and Parks	Economic Development	Revenue Department
Sisseton Wahpeton Oyate	THPO	Fish & Wildlife Department Land Management Natural Resources	Planning Department & Economic Development	
Standing Rock Sioux Tribe	THPO	Game, Fish, and Parks	Department of Finance & Planning Department	Tax Department
Yankton Sioux Tribe	THPO	Game, Fish, and Parks	N/A	N/A

Source: Official Tribal Nation websites

1.8.2 Tribal Tax Codes and Tax Agreements

Tribal tax codes and tax agreements with the State of South Dakota are variable across Tribal Nations as seen in Table 18. Most Tribal Nations in South Dakota have either a full or limited tax collection agreement with the state. These Tribal Nations are classified as special taxing jurisdictions. All tax due in each Special Jurisdiction is reported on the state tax return using the code assigned to that Tribal Nation.

The tourism tax only applies in the five Tribal Nations that have a full tax agreement with the State of South Dakota. The tourism tax is an additional tax imposed on certain lodging and amusement services that helps fund tourism promotion at the state level. The 1.5% tourism tax applies to the gross receipts of hotels and lodging places, campgrounds, motor vehicle rentals, recreational equipment rentals, recreational services, spectator events, visitor attractions year-round and visitor-intensive businesses during the months of June, July, August, and September.

A percentage of taxes collected by the state of South Dakota is distributed to each Special Jurisdiction as outlined in Table 19.

It is important to note that Tribal Nations are neither consistently implementing the Tourism Tax nor enforcing compliance among Tribal members. The tourism tax, if applied and enforced consistently, can provide stable funding over time for tourism development activities, including the creation of a tourism office, or for infrastructure development projects.

TABLE 18: Main Taxes and Tax Rates—Tribal Nations in South Dakota

Tribal Nation	Agreement with State	Tax Rate (%)			
		Sales/Use	Contractor's Excise	Tourism	City
Cheyenne River Sioux Tribe	Full	4.5%	2%	1.5%	1% applied in Dupree, Eagle Butte, Isabel, and Timber Lake
Crow Creek Sioux Tribe	Full	4.5%	2%	1.5%	N/A
Flandreau Santee Sioux Tribe	None	N/A	N/A	N/A	N/A
Lower Brule Sioux Tribe	None	N/A	N/A	N/A	N/A
Oglala Sioux Tribe	Full	4.5%	2%	1.5%	N/A
Rosebud Sioux Tribe	Full	4.5%	2%	1.5%	2% tax applied in Mission
Sisseton Wahpeton Oyate	Limited	4.5% applied only to goods and services purchased outside of the reservation	2% tax for non-Tribal businesses and specific locations	n/a	n/a
Standing Rock Sioux Tribe	Full	4.5%	2%	1.5%	1% applied in McLaughlin and Morristown; 2% in McIntosh
Yankton Sioux Tribe	Limited	4.5% applied only to goods and services purchased outside of the reservation	2% tax for non-Tribal businesses and specific locations	N/A	N/A

Source: South Dakota Department of Revenue

TABLE 19: Tax Distribution between Tribal Nations and the State of South Dakota[50]

Special Jurisdiction	State	Tribal Nation	County that is 100% Tribal Land	FY 2020 Tourism Taxable Sales (by county)	FY 2020 Tax Due to State (by county)
Cheyenne River Sioux Tribe	19%	81%	Dewey Ziebach	$9,966.39 $26,042.04	$149.50 $390.64
Crow Creek Sioux Tribe	10%	90%	N/A	N/A	N/A
Oglala Sioux Tribe	7%	93%	Oglala Lakota	$9,461.42	$141.93
Rosebud Sioux Tribe	7%	93%	Todd	$10,642.93	$159.67
Standing Rock Sioux Tribe	25%	75%	Corson	N/A	N/A

FY 2020 is July 2019 to June 2020.
Source: South Dakota Department of Revenue, 2020.

1.8.3 Outdoor Recreation Licenses

Outdoor recreation, including hunting and fishing, is not only a tradition for South Dakotans but also an important tourism segment. In 2019, the State of South Dakota sold a total of 337,799 hunting, fishing and trapping licenses.[51]

Hunting and Fishing licenses on Tribal Nations are more expensive and in higher demand than those available statewide.[52] Hunting licenses issued by Tribal governments are independent and not interchangeable with the hunting licenses issued by the State of South Dakota. Precise numbers of hunting and fishing licenses sold by Tribal Nations and revenue generated from this activity are not known at this time.

1.8.4 Human Resource Development

In order to succeed, a tourism destination needs to have a well-trained workforce available to respond to its demand. A variety of higher education institutions and workforce development organizations provide training opportunities for aspiring tourism professionals throughout Indian Country in South Dakota. This is considered a strength for tourism development.

Six Tribal Nations have university-level educational institutes offering degrees in areas relevant to tourism. Outside the Tribal Nations, four public and private universities also offer degrees in areas needed to succeed in tourism. Table 20 presents the details of the degree programs. Many of the universities offer scholarships aimed at Native American students who wish to pursue a higher degree.



Courtesy of South Dakota Department of Toursim

[50] South Dakota Department of Revenue. (2020). South Dakota Sales and Use Tax. Tourism Tax by County. Retrieved from https://dor.sd.gov/media/jvgnrya0/fy20county-tourism.pdf

[51] Yost, Rae. (2019). Fewer hunters, anglers means less money for the state. Retrieved from https://www.keloland.com/keloland-com-original/fewer-hunters-anglers-means-less-money-for-the-state/

[52] Solimar International. (2018). Northern Great Plains Tribal Tourism Assessment Initial Findings.

TABLE 20: : Educational Institutions in Tribal Nations and South Dakota[53]

Educational Institution	Program
Tribal Colleges	
Oglala Lakota College/Cheyenne River Community College Center	Business Administration
Lower Brule Community College	Lakota Studies
Oglala Lakota College (Pine Ridge)	Business Administration
Sinte Gleska University (Rosebud)	Business Management
Sisseton Wahpeton College	Business Management
Sitting Bull College (Standing Rock)	Business Administration Business Management
Ihanktonwan Community College (Yankton)	Business Management
South Dakota Universities	
University of South Dakota	Business (graduate and undergraduate) Business Analytics (graduate) Tourism and Hospitality Management
Augustana University	Business Administration Economics (Pre-Professional)
South Dakota State University	Hospitality Management, B.S. Sports & Recreation Management Business Economics (B.S. and B.A.)
Black Hills State University	Tourism and Hospitality Management, B.S

Source: GW International Institute of Tourism Studies

In addition to these academic institutions, various business development programs applicable to the tourism sector are offered by a range of organizations and public agencies. For example, SD Tourism provides certification training in several areas including hospitality and customer service, marketing, and promotion. Organizations such as the Four Bands Community Fund, First Peoples Fund, and Thunder Valley Community Development Corporation provide entrepreneur training and incubator-style programs to support capacity building for entrepreneurs and students.

1.8.5 Ease of Doing Business and Access to Capital

South Dakota ranks 14th out of the 50 states when it comes to opening and operating a business, according to Forbes. Additionally, opening a business in South Dakota costs 15% less than the national average.[54]

Ease of doing business in each Tribal Nation is contingent on their respective laws and regulations. Table 21 reveals that while five Tribal nations have business laws and codes, four nations may not.

[53] BA – Bachelor of Arts; AA – Associate in Arts; K-12 – Kindergarten to 12th grade (high school)

[54] Forbes Magazine. (2019) Best States for Business List. Retrieved from: https://patch.com/us/across-america/forbes-best-states-business-rankings-nc-utah-top-list

TABLE 21: Business Codes and Access to Capital in Tribal Nations

Tribal Nations	Applicable Laws and Codes	Community Development Financial Institutions	Commercial Banks
Cheyenne River Sioux Tribe	N/A	Four Bands Community Fund	Western Dakota Bank (Eagle Butte & Timber Lake) State Bank of Eagle Butte 1st Financial Bank, Dupree
Crow Creek Sioux Tribe	N/A	N/A	N/A
Flandreau Santee Sioux Tribe	N/A	N/A	First Savings Bank Farmers State Bank
Lower Brule Sioux Tribe	N/A	N/A	Wells Fargo, Lower Brule
Pine Ridge Sioux Tribe	Oglala Sioux Tribe Business Licenses Code; Uniform Commercial Code	Lakota Fund Mazaska Owecaso Otipi Financial	Lakota Federal Credit Union Security First Bank
Standing Rock Sioux Tribe	Title 16 – Section 16-409 of Resolution 578-14	N/A	Dacotah Bank Wells Fargo First National Bank in Phillip
Sisseton Wahpeton Oyate	Title 4 Section 53-04-09	N/A	Sisseton-Wahpeton FCU Wells Fargo First National Bank
Yankton Sioux Tribe	Title 16 – Tax Code	Emerging Native CDFI	First Dakota National Bank Ameriprise First Savings Bank

Source: GW International Institute of Tourism Studies

Labor laws can differ substantially among Tribal Nations and the state and federal governments. In general, Tribal Nations do not apply federal employment laws and have their own policies and regulations. They are also exempt from some anti-discrimination laws—for example, the Americans with Disabilities Act and Title VII of the 1964 Civil Rights Act.[55] [56]

In Tribal Nations, most economic and community development activity depends on the status of the land. Both Tribal Nations and Tribal members own lands in three basic ways: trust, restricted fee, and fee simple (or fee). Planning for a tourism development project in Tribal Nations in South Dakota requires that tourism operators determine and understand the legal ownership status of the land to be used for their operations.

Access to financing is critical for tourism development. As seen in Table 21, four of the nine Tribal Nations in South Dakota have at least one Community Development Financial Institution (CDFI)—agencies which serve people in low-income communities that have historically been locked out of the financial system. CDFIs emphasize long-term relationships with members of the community to help them gain financial literacy, establish savings goals, build credit and access affordable loans. CDFIs also provide loans and venture capital to community-oriented projects. Commercial banking is also available in most Tribal Nations in South Dakota. While financing options are available, there are many bottlenecks to receiving these funds, including bureaucracy, unclear application processes, and a lack of coordination between sectors.

[55] "There has been much confusion about whether federal disability civil rights laws apply to Native American tribes. Federal law recognizes the sovereign authority of Native American tribes to govern themselves. An important aspect of sovereignty is the doctrine of sovereign immunity; where in most situations, state and federal courts do not have the jurisdiction to hear private lawsuits brought against Native American tribes." Southwest ADA Center (2003). See: http://www.southwestada.org/html/publications/ebulletins/legal/2003/may2003b.html

[56] "Since Indian Tribes are exempt from the provisions of the Act under Section 701(b)(1), preferences or requirements based on tribal membership or affiliation imposed by a tribe with respect to its own employment practices are not violative of Title VII." Thomas, C. (1988). Policy Statement on Indian Preference Under Title VII.

1.8.6 Community Safety and Security

Tribal Nations have full jurisdiction over the enforcement of Tribal Law according to their Tribal Codes and federal law.[57]

The Indian Self-Determination and Education Assistance Act of 1975 (Public Law 93-638) provides for the investment and maintenance of law enforcement in all Tribal jurisdictions, however some Tribal Nations are under the jurisdiction of the Bureau of Indian Affairs (BIA). Tribal Nations may also enter into agreements with the State of South Dakota for policing: Crow Creek Sioux Tribe had a Memorandum of Understanding (MOU) with the State of South Dakota that covered only highway patrol during their annual fair.

Aside from 638 funds, Tribal Nations can also access grants and other financing for safety and security. For example, the Department of Justice (DOJ) provides financing to fight specific crimes or to fund programs for community safety.

In 2019, six of the nine Tribal Nations received grants totaling $4.2 million to help them fight crimes against women, promote safety, and address alcohol and substance abuse.

Another area of shared enforcement is game and fishing management. South Dakota Game, Fish and Parks (SDGFP) has five individual MOUs with Tribes, in which they agree to coordinate on animal welfare, managing predatory animals, sharing statistics on animal hunting, and providing safe hunting classes, cultural resources, law enforcement training, chronic wasting disease training, and more. While respecting the sovereignty of the Tribal Nations, SDGFP can perform some law enforcement within parks that overlap tribal lands as long as all authorities are informed. Enforcement coordination is also expected on a case-by-case basis.

Table 22 summarizes the main agreements that ensure the safety and security of residents and visitors.

TABLE 22: Law Enforcement Provisions in the Tribal Nations in South Dakota

Tribal Nations	Tribal Jurisdiction	BIA Jurisdiction or Support	Legal Agreement with South Dakota Game, Fish and Parks
Cheyenne River Sioux Tribe	Tribal Police	638 Funds	—
Crow Creek Sioux Tribe	Tribal Police	BIA Police	—
Flandreau Santee Sioux Tribe	Tribal Police	638 Funds	MOU with SDGFP
Lower Brule Sioux Tribe		BIA Police	MOU with SDGFP
Rosebud Sioux Tribe	Tribal Police	638 Funds	MOU with SDGFP
Oglala Sioux Tribe	Tribal Police	638 Funds	In Progress MOU with Pennington County Sheriff MOU with SDGFP
Standing Rock Sioux Tribe	—	BIA Police	—
Sisseton Wahpeton Oyate	Tribal Police	638 Funds	—
Yankton Sioux Tribe	Tribal Police	638 Funds	MOU with SDGFP

Source: GW International Institute of Tourism Studies

[57] Tribal Court Clearinghouse. (2020). General Guide to Criminal Jurisdiction in Indian Country. Retrieved from https://www.tribal-institute.org/lists/jurisdiction.htm

1.9 Tourism Demand

An evaluation of a destination's tourism demand is a critical step in assessing an area's tourism development potential: who are the current visitors, where do they come from and when, what do they want to see and do, and what services and facilities do they require to satisfy their own needs and expectations for their visit. In addition, communities need to know the factors influencing a visitor's trip, what sources of information are used for trip planning, the modes of transport used, how long visitors stay, and how much they spend.

This section provides an overview of tourism in South Dakota over a three-year period (2016–2018), and a brief summary of the economic impact of tourism on the state's economy at the end of 2019. It also outlines key insights about the demand for Native American tourism at a national level and discusses the limited data available about visitation to Tribal Nations in South Dakota.

Following are the main takeaways:

- South Dakota received a total of 14.5 million visitors in 2019, 53% of whom were traveling for leisure.
- A large portion of South Dakota's visitors (41%) came from neighboring states, especially Minnesota, Iowa and Nebraska.
- The most popular activities for leisure travelers in South Dakota were shopping, family and life events, cultural activities, culinary experiences and nature-related activities.
- The most common form of transportation used to travel to South Dakota is automobile (96%), suggesting road trips are a large part of the tourism industry in the state.
- South Dakota's tourism is subject to seasonality, with 45% of leisure travelers visiting in the summer months.
- Most (86%) travelers to South Dakota who responded to an SD Tourism survey indicated they would consider adding a Native American Tourism experience as part of a future vacation.
- Travelers view South Dakota as a destination for nature-based activities—including national and state parks, scenic drives and outdoor recreation—and cultural heritage activities such as visiting historic sites and monuments.
- There are currently 14 tour operators providing tours to Tribal Nations in South Dakota.
- COVID-19 has had a significant impact on tourist arrivals in South Dakota; however, data suggests travelers will be seeking out regional destinations and road trips as they begin to travel again. Additionally, travelers will be interested in outdoor experiences in more rural locations; this provides an opportunity for tourism in this region.
- There is a dire need to collect tourism data for the Tribal Nations in South Dakota on an ongoing basis. This data could assist tourism governance bodies in their tourism planning to ensure strategies are market-driven.

1.9.1 South Dakota Tourism Demand

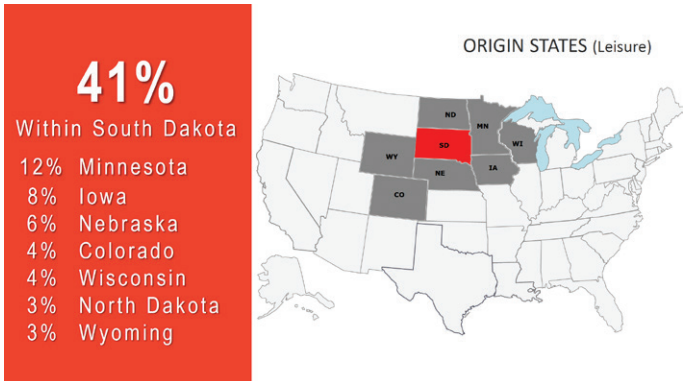
South Dakota received a total of 14.5 million visitors (domestic and international) in 2019. This number includes day visitors (defined as those who traveled more than 50 miles) and overnight tourists. This is the highest growth rate that the state has experienced since 2014.[58]

In 2019, 41% of arrivals were domestic visitors originating from neighboring states, including Minnesota (12%), Iowa (8%), and Nebraska (6%).

As of 2018, 382 international tour operators were offering overnight trips in South Dakota. Collectively, these international operators promoted 6,613 individual tourism products and experiences, and booked 71,227 room nights throughout the state.[59]

In 2019, the main source markets for international arrivals are Canada (66%); Europe (16%); Asia (11%); Latin America, the Middle East and Oceania (2%); and Mexico (1%).[60]
The effects of COVID-19 on tourism demand have been felt

FIGURE 12: Origin Designated Market Areas (DMAs)



Source: 2016–2018 South Dakota Leisure Traveler Snapshot. MMGY Global

[58] Tourism Economics. (2019). Economic Impact of Tourism in South Dakota, 2019. Retrieved from https://sdvisit.com/sites/default/files/2020-01/19EcoImp_Tourism_Economics.pdf

[59] Ibid. Numbers are based on the Great American West Trip Report conducted by the Rocky Mountain International, the official regional destination marketing organization that promotes Montana, North Dakota, South Dakota, Wyoming, and Idaho to the international travel trade. Information and statistics only reflect the travel trade from the UK, Germany, France, Italy, Benelux, Nordic and Australia/New Zealand (ALON Marketing Group, 2018)

[60] Tourism Economics. (2019). Economic Impact of Tourism in South Dakota, 2019. Retrieved from https://sdvisit.com/sites/default/files/2020-01/19EcoImp_Tourism_Economics.pdf

across the U.S.. Travel spending within the U.S. dropped by 88% in April compared to the same period in 2019. Air arrivals in South Dakota were reduced by almost 100% in April year over year, and road arrivals fell by 80%. Hotel occupancy rates in South Dakota were down by 46% in May this year. The statistics paint a bleak picture for tourism in South Dakota, but more recent numbers demonstrate that tourism is slowly returning. Data indicates that 46% of U.S. respondents expect to be traveling again by the fall, and tourism spend is already rising. Additionally, 29% of U.S. travelers have changed their vacation plans to a destination within driving distance, suggesting an increase in demand for regional travel and road trips, and creating a potential opportunity for destinations within South Dakota.[61]

1.9.2 South Dakota Economic Impact

The state and local tax dollars generated by travel and tourism activity amounted to **$308 million**, an **increase of $10 million from the previous year**. The tax revenue collected by **local governments** from travel and tourism activity **totaled $172 million, and each South Dakota household saved $890 in taxes** because of the growth of the tourism industry. [62]

The tourism industry also supported 55,157 jobs (direct, indirect and induced), representing **8.8% of all South Dakota jobs**.

1.9.3 South Dakota Leisure Market Characteristics

This section provides an overview of the profile of leisure travelers to South Dakota.

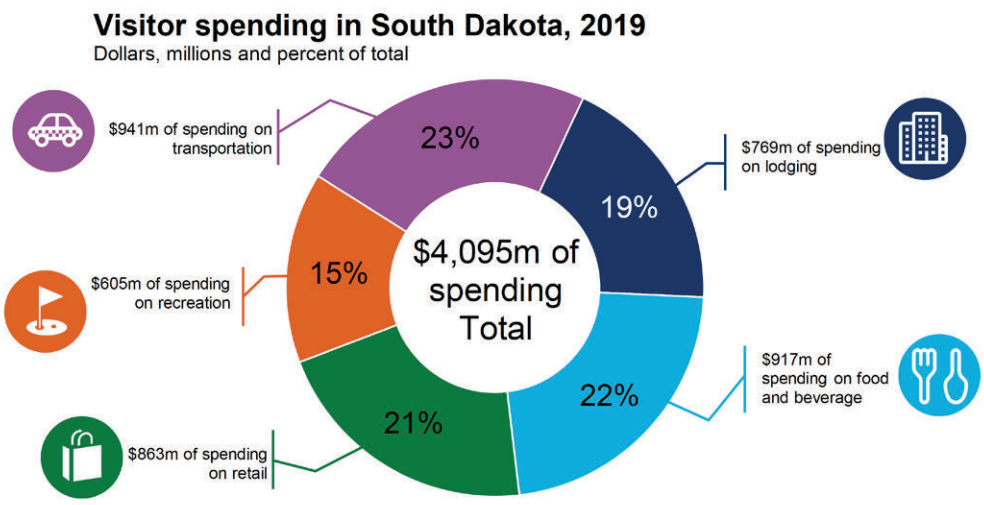
A. Demographics

A survey of U.S. households between 2016 and 2018 provided a general profile of leisure travelers to South Dakota during this period:

- Average age of 53
- Median income of $80,900
- 34% have children in their household
- 57% are employed, with 45% holding managerial and professional jobs and 36% sales and administrative positions
- 76% have attended college or technical school

Figure 14 reveals that the baby boomers (born between 1946 and 1964) are the most important generational cohort for South Dakota's tourism industry. Baby boomers are currently 56 to 74 years old; as they approach retirement, leisure travel is becoming increasingly important to them. Baby boomers account for 44% of leisure travelers to South Dakota. This group is surprisingly one of the more prolific users of technology among the generations, with around 84% booking online.[65]

FIGURE 13: Distribution of Visitor Spending



Source: Tourism Economics

[61] South Dakota Department of Tourism. (2020). COVID-19 Research. Retrieved from: https://sdvisit.com/sites/default/files/2020-06/COVID-19%20WEEKLY%20UPDATE_062520.pdf

[62] Tourism Economics. (2019). Economic Impact of Tourism in South Dakota, 2019. Retrived from https://sdvisit.com/research-reports/econ/2019-economic-impact-report

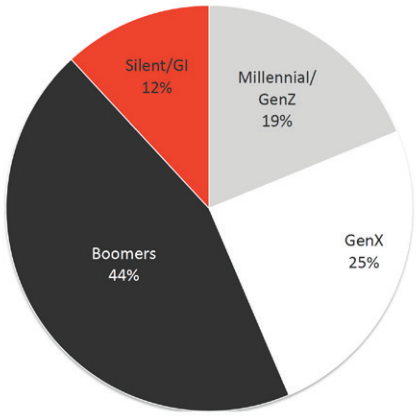
[63] MMGY Global. (2019). 2016-2018 South Dakota Leisure Traveler Snapshot. Retrieved from https://sdvisit.com/sites/default/files/2019-11/RevealingTheSouthDakotaVisitor_112019.pdf

[64] DK Shifflet. (2019). Year end 2018 U.S. Travel - South Dakota Office of Tourism.

[65] Vivion, N. (2016). What Stats Reveal about Travel Behaviors by the Generation. Retrieved 02/19/20 from https://www.sabre.com/insights/what-stats-reveal-about-travel-behaviors-by-generation/

The silent generation cohort (born between 1928 and 1945) accounts for 12% of all leisure travelers to South Dakota. This generation is now between the ages of 75 and 92, and tends to spend less on leisure travel each year than other generations.[66] The silent generation shares some travel preferences with baby boomers, such as enjoying sightseeing, dining out, and participating in cultural and soft adventure tourism activities. However, they also have unique preferences. While baby boomers participate in activities that have a strong physical component, the silent generational cohort prefers activities such as visits to casinos or museums.[67]

FIGURE 14: Generational Composition of the South Dakota Leisure Market[68]



Source: MMGY Global, 2019

Compared to other cohorts, baby boomers and the silent generation share a high degree of sophistication, have extensive travel experience, and are willing to travel more often and stay longer at the destination (which translates into more spending). They also have more leisure time, higher levels of discretionary income and lower levels of indebtedness.[69] These cohorts also tend to travel during the shoulder (off-peak) season, which makes them an ideal market segment to reduce seasonality—one of the main problems faced by South Dakota and destinations around the world.[70]

Generation X (born 1965–1980) accounts for 25% of the total leisure market for South Dakota and travels mostly for pleasure. They prefer family-oriented and comfortable experiences.[71] They spend slightly more on travel than millennials or boomers. Generation X is fairly reliant on online travel agencies during their decision process, with 71% using OTAs and review apps during this phase. In total, 82% of Generation X books travel online. This generation's purchase power represents 31% of total income.[72]

While a smaller segment (19%) of leisure travelers to South Dakota, the millennials (born 1981–1996) and Generation Z (born 1997–2012) have great potential since they are the first cohorts to have traveled frequently from a young age, and have gathered significant travel experience before reaching adulthood.[73] These experiences influence how they organize their trips. They organize their travel itineraries independently, and favor the use of direct online reservations. At the same time, millennials seek destinations that offer memorable and unique experiences that engage them emotionally and physically.[74] They value authenticity, complete immersion in local cultures and direct, close contact with residents. They also support environmental protection and social causes.[75]

While post-COVID-19 travel behaviors are not yet fully researched, there are predictions for concerns and expectations of each generation. All generations share some features in terms of their post-COVID-19 outlook, agreeing that local and regional travel is safer and more attractive than long-distance and international travel. The silent generation is expected to travel more to visit family, tick off bucket-list items, and pursue "safe" adventures; they will be looking for less crowded, and likely open-air, destinations.[76]

[66] Bedgood, L. (2019). Consumer Shopping Trends and Statistics by the Generation. Retrieved from: https://www.business2community.com/trends-news/consumer-shopping-trends-and-statistics-by-the-generation-gen-z-millennials-gen-x-boomers-and-the-silents-02220370

[67] Lehto, X., Jang, S., Achana, F., & O'Leary, J. (2008). Exploring tourism experience sought: A cohort comparison of Baby Boomers and the Silent Generation. Retrieved from http://citeseerx.ist.psu.edu/viewdoc/download?doi=10.1.1.1027.7985&rep=rep1&type=pdf

[68] MMGY Global. (2019). 2016-2018 South Dakota Leisure Traveler Snapshot. Retrieved from https://sdvisit.com/sites/default/files/2019-11/RevealingTheSouthDakotaVisitor_112019.pdf

[69] Hung, K., and Lu, J. (2015). Active Living in Later Life: An overview of aging studies in hospitality and tourism journal. *International Journal of Hospitality Management*, 53.

[70] Patterson, I., & and Pegg, S. (2009). Marketing the Leisure Experience to Baby Boomers and Older Tourists. *Journal of Hospitality Marketing & Management* 18(2-3), 254-272.

[71] Source: Virtuoso, the leading global network of agencies specializing in luxury and experiential travel, with more than 20,000 advisors.

[72] Vivion, N. (2016). What Stats Reveal about Travel Behaviors by the Generation. Retrieved 02/19/20 from https://www.sabre.com/insights/what-stats-reveal-about-travel-behaviors-by-generation/

[73] Travel Pulse. (2014). Survey Says: Millennials Now Drive Leisure Travel in U.S. Retrieved from http://www.travelpulse.com/news/travel-agents/survey-says-millennials-now-drive-leisure-travel-in-us.html

[74] Moscardo, G., & Benckendorff, P. (2010). *Mythbusting: Generation Y and travel.* Tourism and Generation Y. Edited by Benckendorff, Moscardo and Pendergast. Oxfordshire, U.K.: CAB International. 16-26.

[75] Kotler, P., & Keller, K. (2010). Marketing Management. 12th Edition, New Delhi: Dorling Kindersley Pvt. Ltd.

[76] Fishman, A. (2020). What to know about travel marketing across generations post-COVID-19. Retrieved from: https://www.phocuswire.com/post-covid-travel-marketing-by-generation



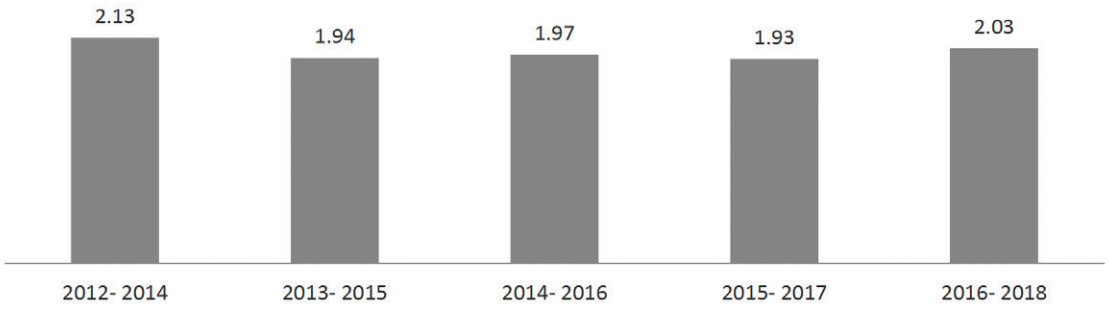
Courtesy of South Dakota Department of Toursim

The baby boomers, like the silent generation, are vulnerable to the COVID-19 pandemic and will pursue destinations deemed "safe" when they start to travel again. Generation X is practical and was focused on health and well-being even before the recent health crisis. This generation will also be focused on attractions that provide social distancing opportunities, and health and wellness retreat activities. Millennials and Generation Z tend to view the virus as a boomer disease, and feel relatively unaffected by it in terms of their own health. These groups will be less focused on health and safety measures post-COVID-19, and will be more likely to attend indoor activities and crowded locations before the other generations.[77]

B. Length of Stay

Generally, the longer a visitor stays in a destination, the greater the opportunity to spend—and as a direct consequence, the greater the economic impact in the location where the spending occurs. Figure 15 depicts the average length of stay for South Dakota's leisure market between 2012 and 2018. South Dakota's average length of stay remained relatively stable over the 7-year period, maintaining an average of between 1.93 and 2.13 nights. However, this average is considered low in comparison to the national average overnight trip duration of 3.9 nights in 2015.[78]

FIGURE 15: Average Length of Stay[79]



Source: MMGY Global, 2019.

[77] Fishman, A. (2020). What to know about travel marketing across generations post-COVID-19. Retrieved from: https://www.phocuswire.com/post-covid-travel-marketing-by-generation

[78] U.S. Travel Association Domestic Travel Sheet (2020). Domestic Travel Fact Sheet. Retrieved 03/13/202 from https://www.ustravel.org/system/files/media_root/document/Research_Fact-Sheet_Domestic-Travel.pdf

[79] MMGY Global. (2019). 2016-2018 South Dakota Leisure Traveler Snapshot. Retrieved from https://sdvisit.com/sites/default/files/2019-11/RevealingTheSouthDakotaVisitor_112019.pdf

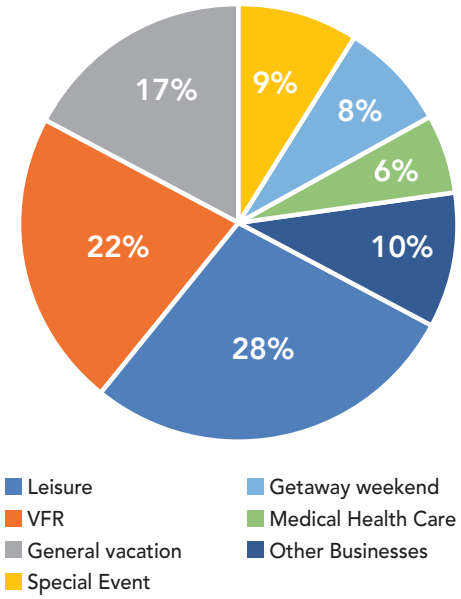
C. Purpose of Travel

For 53% of all visitors, leisure, general vacation or getaway weekends are the primary reasons to visit South Dakota. Another 22% of visitors come to visit friend and relatives (VFR) as can be seen in Figure 16. The VFR segment is often overlooked because the accommodation component of the stay is less visible and measurable. However, VFR segments can play a significant role for destinations, due to their emotional and historical ties to the area.

D. Leisure Activities

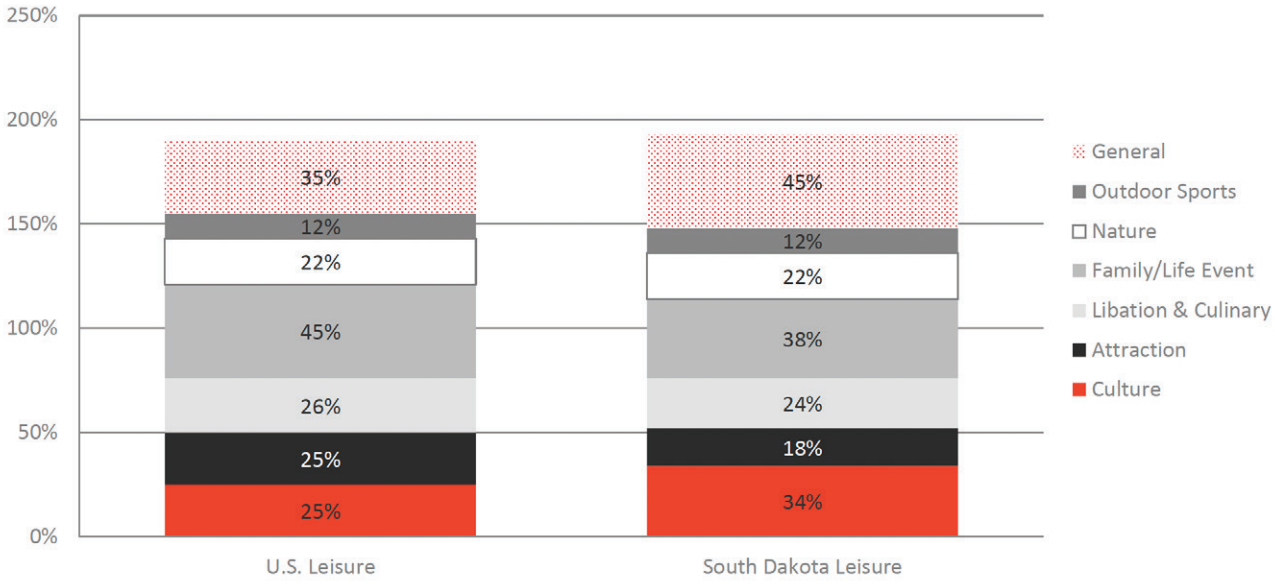
Activity resources are motivating factors in choosing a destination. South Dakota boasts a diverse range of natural and cultural tourism attractions as well as outdoor and recreational activities. Figure 17 depicts preferred tourism activities of the U.S and South Dakota leisure markets. The most popular tourism activities for leisure travelers in South Dakota are general activities (45%, of which 35% is leisure shopping), family/life events (38%), cultural activities (34%), culinary experiences (24%) and nature-related activities (22%).

FIGURE 16: Purpose of Travel in South Dakota[80]



Source: MMGY Global, 2019.

FIGURE 17: Activity Participation—U.S. and South Dakota Leisure Market[81]

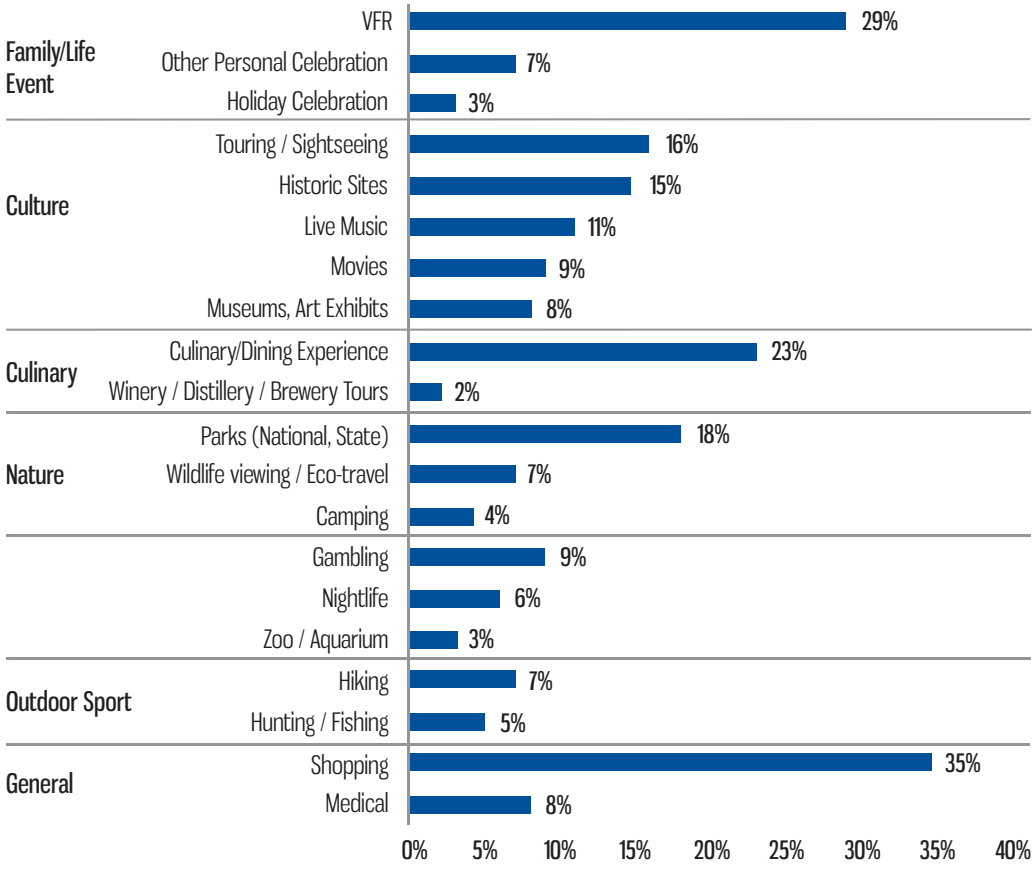


Source: MMGY Global, 2019.

[80] MMGY Global. (2019). 2016-2018 South Dakota Leisure Traveler Snapshot. Retrieved from https://sdvisit.com/sites/default/files/2019-11/RevealingTheSouthDakotaVisitor_112019.pdf

[81] Ibid.

FIGURE 18: Breakdown of Leisure Activity Participation in South Dakota



Source: MMGY Global, 2019.

Post-COVID travel is likely to change how visitors want to experience destinations. Visitors will be searching for cleaner and more isolated destinations, rather than large cities or popular attractions.[82] Larger attractions will have to implement crowd-control strategies and promote social distancing to ensure the safety of visitors and staff. Visitors are also placing a priority on outdoor recreation activities, including hiking, trekking and cycling, as these are naturally more distant, with less interaction with others.[83]

[82] Kiesnoski, K. (2020). Travel Changed After 9/11: Here's how it will look after the Covid-19 pandemic finally recedes. Retrieved from https://www.cnbc.com/2020/05/10/heres-how-travel-will-change-after-the-covid-19-pandemic-recedes.html

[83] Riley, E. (2020. What the Future of Adventure Travel Looks Like. Retrieved from https://www.outsideonline.com/2413863/future-adventure-travel-after-coronavirus-pandemic

E. Mode of Transportation

The main modes of transportation leisure tourists use to visit South Dakota are automobiles (96%), airplane travel (3%), and train, bus, other. (together 1%).[84, 85]

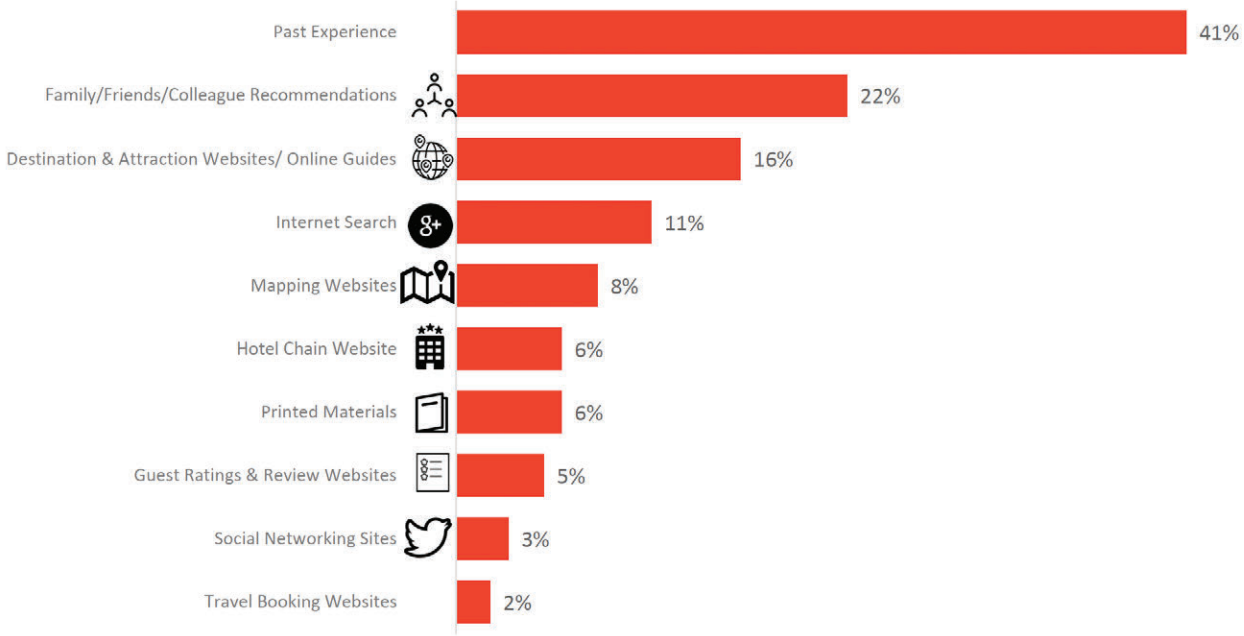
Seven million travelers from neighboring states such as Minnesota, Nebraska and Illinois have taken at least one vacation via personal automobile in the Great Plains region.[85] Road-trippers are generally couples, retirees and families. Most have an average age between 39 and 59, they typically have one child in their household, and their average household income is approximately $92,000.[87] Both the RV and motorcycle segments are considered niche markets for South Dakota. Every year in the month of August, the city of Sturgis in the Black Hills holds a Motorcycle Rally which attracts 500,000 bikers. The RV market is served by 249 RV parks, resorts and campgrounds.[88]

As mentioned above, the effects of COVID-19 on tourism have led to an increasing demand for regional tourism and road trips, with 29% of U.S. travelers having changed their vacation plans to destinations within reach by car.[89] This suggests South Dakota should expect an increase in road trip visitors over the coming months, and possibly years.

D. Trip Planning

Learning about the resources visitors to South Dakota use to plan their trips is fundamental for tourism planning and the development of marketing strategies. Figure 19 shows the resources used by leisure travelers in planning their trip to South Dakota as a destination. A large percentage of these travelers use more informal methods to plan their trips to South Dakota, including past experience (41%) and family or friend recommendations (22%). These travelers also use websites as part of their planning, including official destination or attraction websites (16%), mapping websites (8%), hotel chain websites (6%) and travel review websites (5%).

FIGURE 19: Trip Planning Resources Used by the Leisure Market in South Dakota[90]



Source: MMGY Global, 2019.

[84] 848,00 deplanement flights were registered in 2018 for both Rapid City and Sioux Falls.

[85] MMGY Global. (2019). 2016-2018 South Dakota Leisure Traveler Snapshot. Retrieved from https://sdvisit.com/sites/default/files/2019-11/RevealingTheSouthDakotaVisitor_112019.pdf

[86] Solimar International. (2018). Northern Great Plains Tribal Tourism Assessment Initial Findings.

[87] Ibid.

[88] Campground Reviews. (2020). South Dakota RV and Campgrounds. Retrieved 03/13/2020 from https://www.campgroundreviews.com/regions/south-dakota

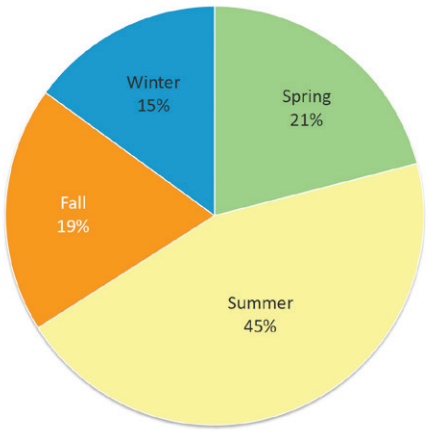
[89] South Dakota - Department of Tourism. (2020). COVID-19 Research. Retrieved from: https://sdvisit.com/sites/default/files/2020-06/COVID-19%20WEEKLY%20UPDATE_062520.pdf

[90] MMGY Global. (2019). 2016-2018 South Dakota Leisure Traveler Snapshot. Retrieved from https://sdvisit.com/sites/default/files/2019-11/RevealingTheSouthDakotaVisitor_112019.pdf

1.9.4 Tourism Seasonality

One of the main challenges destinations face is sustaining a constant flow of visitors throughout the year. Seasonality impacts length of stay, which in turn affects the seasonal cycle of employment. In the case of South Dakota, climate is a significant factor that influences visitation. Figure 20 illustrates that while the state receives visitors year-round, the largest share of leisure travelers (45%) visit during the summer months, making it the peak season. The winter months receive the lowest level of leisure travelers (15%) and are considered the shoulder season.

FIGURE 20: Seasonality in South Dakota[91]



Source: MMGY Global, 2019.

1.9.5 Native American Tourism in South Dakota

This section provides insights about the actual and potential demand for Native American tourism in South Dakota.

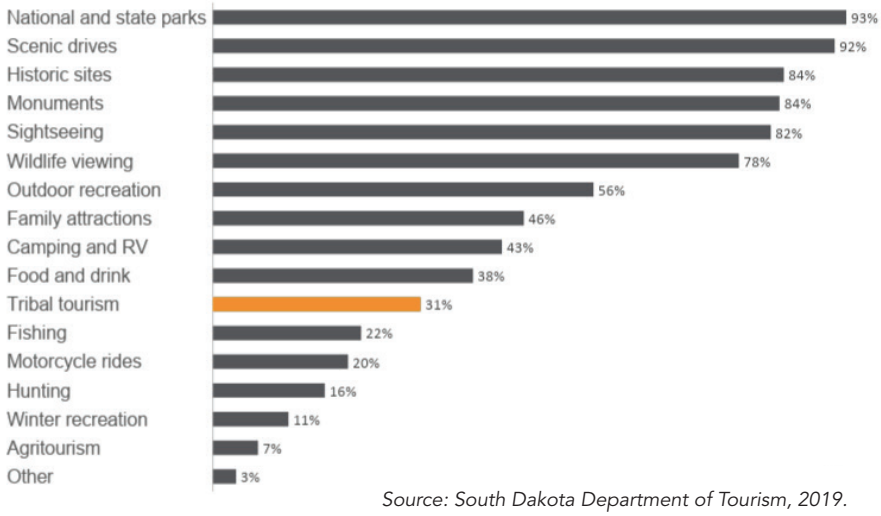
A. Potential Demand for Native American Tourism

In 2018, SD Tourism conducted a study to gauge the potential demand for Native American tourism in South Dakota. The survey was distributed to 441 individuals from 46 states in the U.S. and 26 individuals from other countries.[92]

As shown in Figure 21, 31% of respondents thought of Native American tourism as a key activity of a South Dakota vacation. The activities that were most associated with South Dakota fall within two broad categories:

- Natural Heritage: national and state parks (93%), scenic drives (92%), wildlife viewing (78%), and outdoor recreation (56%). This strong association of South Dakota with outdoor activities will be a great opportunity for post-COVID-19 travel, as visitors seek outdoor recreation activities such as trekking, hiking and cycling, which are more socially distant by nature.[93]
- Cultural Heritage: historic sites (84%) and monuments (84%).

FIGURE 21: What activities come to mind when you think of a South Dakota vacation?[94]



Source: South Dakota Department of Tourism, 2019.

[91] MMGY Global. (2019). 2016-2018 South Dakota Leisure Traveler Snapshot. Retrieved from https://sdvisit.com/sites/default/files/2019-11/RevealingTheSouthDakotaVisitor_112019.pdf

[92] Tourism Economics. (2019). Economic Impact of Tourism in South Dakota, 2019. Retrieved from https://sdvisit.com/sites/default/files/2020-01/19EcoImp_Tourism_Economics.pdf

[93] Riley, E. (2020). What the Future of Adventure Travel Looks Like. Retrieved from: https://www.outsideonline.com/2413863/future-adventure-travel-after-coronavirus-pandemic

[94] Tourism Economics. (2019). Economic Impact of Tourism in South Dakota, 2019. Retrieved from https://sdvisit.com/sites/default/files/2020-01/19EcoImp_Tourism_Economics.pdf

The survey findings also revealed that 86% of respondents said that they would consider a Native American tourism experience or activity as part of a future vacation, demonstrating a high potential for this type of tourism. To add these experiences to their next trip, survey respondents indicated that they would need the following information: details about events and activities, as well as the hours, location and cost of participating in these experiences (see Figure 22).

Currently there is limited information readily available about Native American tourism tours and experiences offered on reservations in South Dakota. Online promotion of Native American tourism offerings is not sufficient to attract visitors for the majority of the Tribal Nations. There are two main Native American organizations—the Pine Ridge Chamber of Commerce and Red Cloud Indian School Heritage Center—that are actively promoting tourism experiences online.

Tribal governments also provide some tourism-related information regarding hunting, fishing, and major events such as wacipis, rodeos and fairs on their official tribal websites. Otherwise the most comprehensive sources of visitor information for Native American tourism in South Dakota can be found at the following resources:

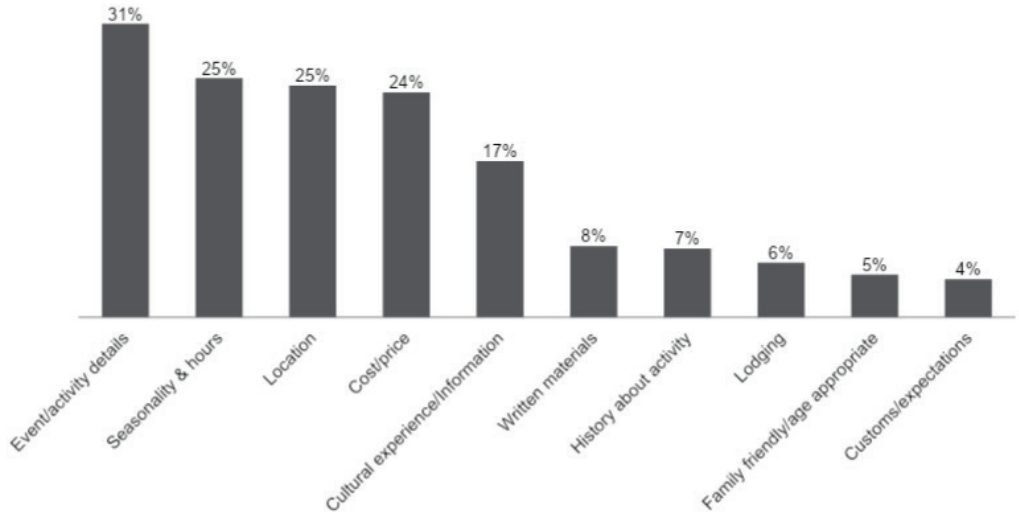
- South Dakota Department of Tourism
- Pine Ridge Chamber of Commerce
- South Dakota Department of Tribal Relations
- Four Bands Community Fund
- South Dakota Missouri River Tourism

Survey respondents also stated that they would like to experience the following attractions and activities during a visit to Indian Country in South Dakota:

- Monuments and Memorials – 43%
- Historical and Cultural Tours – 39%
- Powwow (Wacipi) or Cultural Event – 36%
- Museums – 36%
- Arts and Crafts – 36%
- Traditional Cuisine – 27%
- Reservation Tours – 15%
- Tipi Stays – 15%

They also indicated that although they would like to learn about the culture, there was a general lack of knowledge and available information on cultural heritage, behaviors and norms; this was identified as a hindrance to participating in Native American tourism, as visitors desired more details on what to expect when visiting, and guidelines for appropriate behavior when participating in a cultural event such as a wacipi.

FIGURE 22: What information would you need to add a tribal experience to your trip?[95]



Source: South Dakota Department of Tourism, 2019.

[95] Ibid.

The Heritage Center at the Red Cloud Indian School (RCIS-HC) also conducted a study in 2018 to gauge the potential interest of tourists to visit Indian Country in South Dakota,[96] the results of which were used for developing the Heritage Center's Marketing Development & Implementation Plan.[97] Some of the key findings are outlined below:

- Survey respondents expressed a high level of interest in experiencing Native American history, art, culture and people in South Dakota.
- A high percentage of respondents expressed either a "somewhat high" or "very high" interest level for visiting the Badlands National Park (69%), Crazy Horse Memorial (63%), Wounded Knee Massacre Site (62%) and the Red Cloud Annual Indian Art Show (55%). This result supports the SD Tourism finding that 86% of respondents expressed interest in including a Native American tourism experience or activity as part of their next trip to South Dakota.[98]
- Based on a scale of 1–4, with 4 being the highest ranking possible, respondents identified "taking a tour provided by a Native American guide" as their top choice (3.98), followed closely by "touring a reservation-based historic site" (3.94), "purchasing authentic Native American arts and crafts" (3.85), "viewing a demonstration by a Native American artist" (3.84) and "touring a reservation-based heritage center" (3.81). Some of these choices demonstrate again the traveler's view that South Dakota is a destination for cultural heritage activities, as an area to visit historic sites and monuments.[99]

According to the U.S. National Travel and Tourism Office (NTTO), overseas visitation to Indian Country has been steadily increasing. Between 2010 and 2018 the number of visitors increased by 109%, from 949,000 to more than 1.986 million.

In 2018, nearly 5% of the 39.9 million overseas visitors to the United States reported visiting a Native American community during their travels.[100] These overseas visitors are mainly European (45.3%) and Asian (29.5%). France, the United Kingdom and Germany are the main markets from Europe, and China is the main source market from Asia.



Courtesy of GW International Institute of Tourism Studies

Brand USA, the organization tasked with marketing the U.S. to international travelers, consistently reports that the desire to experience Native American culture is among the most important motivators for travel from Europe (generally second only to visiting national parks). The American Indian Alaska Native Tourism Association (AIANTA) has also prioritized promoting Indian Country to international markets, primarily Germany, Italy and the United Kingdom. European travelers are significantly more likely to travel as part of organized tour groups and typically spend more time traveling during each trip than their American counterparts. However, extensive and sustained efforts would be needed to attract international visitors to Tribal Nations in South Dakota, since they primarily visit Native American communities located in the Pacific Northwest and Southwest.[101] There is general consensus that the international markets will build back slowly after COVID-19.

[96] The RCIS-HC is located in the Pine Ridge Indian Reservation. It is both a cultural center and museum. Through the Center's renowned gift shop and online store, local Lakota artists are empowered to increase their own economic self-sufficiency by making their work available to a wider community.

[97] The Plan was financed through a USDA grant. The firm hired to create the marketing plan for the Heritage Center was Agency MABU, a Native American-owned and operated company headquartered in Bismarck, ND. Agency MABU initiated work on the project in December 2017.

[98] Tourism Economics. (2019). Economic Impact of Tourism in South Dakota, 2019. Retrieved from https://sdvisit.com/sites/default/files/2020-01/19EcoImp_Tourism_Economics.pdf

[99] Ibid.

[100] The National Travel and Tourism Office (NTTO) of the U.S. Department of Commerce's International Trade Administration has the mandate to "enhance the international competitiveness of the U.S. travel and tourism industry and increase its exports, thereby creating U.S. employment and economic growth" by "promoting a positive climate for growth in travel and tourism [in the United States], reducing institutional barriers to tourism, administer joint marketing efforts, provide official travel and tourism statistics, and coordinate efforts across federal agencies through the Tourism Policy Council."

[101] Ibid.

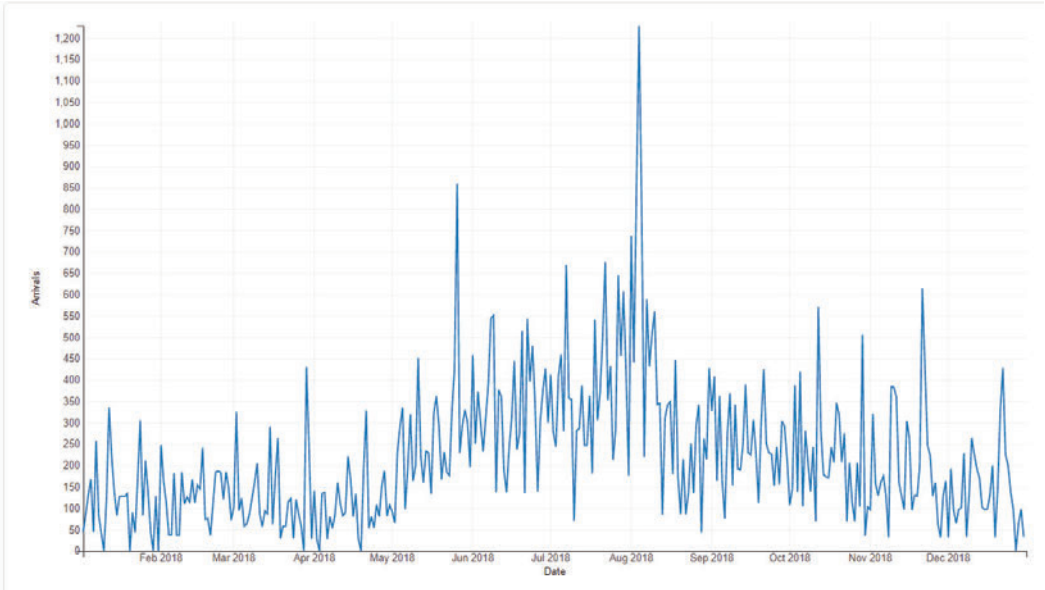
B. Actual Tourism Demand for Native American Tourism

With the exception of the Pine Ridge Reservation, currently there is no historical statistical demand data for Tribal Nations. SD Tourism uses data from the firm Arrivalist, which captures data across the state using mobile phone location data.[102] Pine Ridge is the only Tribal Nation that is included in this data set. The data provides insights about arrivals, the average time spent in the destination (days and hours) and time of year visited. The main findings are outlined below:

- Total count in 2019 was 182,647 (this is estimated to represent about 10–15% of actual visitors)
  Visitors were mainly from within the state and neighboring states:
  - Denver (12.7% of total visitors)
  - Minneapolis/Saint Paul (11.5% of total visitors)
  - Sioux City (5% of total visitors)
- Average time in the destination ranged from a minimum of a few hours to a maximum of a 10-day stay.
- Due to Pine Ridge's proximity to major tourism hubs in western South Dakota, there is an inflow of tourists who have also visited nearby attractions. The Arrivalist data showed that 8.4% had also visited Badlands National Park, 6.1% had visited Hot Springs, 4.9% had visited Crazy Horse Memorial, and 4.1% had visited Custer State Park.
- Peak visitation in 2018 occured between the end of May and the end of October, with the highest peak occurring in August (see Figure 23); this data is consistent with the seasonality of tourism in South Dakota as a whole, with 45% of tourists visiting during the summer months.[103] The peak in August is perhaps attributed to the Annual Oglala Lakota Nation Wacipi and Rodeo. And, the other two smaller surges occurring later in the year are perhaps attributed to Tribal members visiting friends and relatives on the reservation for holidays in November and December.

Three important attractions on the Pine Ridge Reservation have collected some data between 2017 and 2019: PRACC, RCIS-HC and the White River Visitor Center (located at the reservation-side entrance to the Badlands National Park). There is also data available for visitors to the Badlands National Park. Visitor data for these three locations is presented below in Table 23. Between 2017 and 2019, RCIS-HC experienced a 15% decrease in visitation, which is not a good indicator.

FIGURE 23: 2018 Tourism Visitation Seasonality – Pine Ridge Reservation



Source: South Dakota Department of Tourism, 2018

[102] Arrivalist's methodology is based on a representative balanced panel of GPS signals representing road trips taken specifically in cars (excluding travel by air). A trip is measured as one where the user has traveled a minimum of 50 miles and spent a minimum of two hours at the destination.

[103] MMGY Global. (2019). 2016–2018 South Dakota Leisure Traveler Snapshot.
Retrieved from https://sdvisit.com/sites/default/files/2019-11/RevealingTheSouthDakotaVisitor_112019.pdf

TABLE 23: Pine Ridge Reservation Related Arrivals Data, 2017–2019

Year	PRACC	RCIS-HC	White River Visitor Center	Badlands National Park
2017	n/a	11,279	N/A	1,054,325
2018	2,233	10,511	15,000	1,008,942
2019	N/A	9,592	N/A	970,998

Source: PRACC, RCIS-HC, White River Visitor Center, Badlands National Park

The peak months for visitation were April through August. No information is collected on demographics, place of origin, size of party, mode of transportation and other trip characteristics. Staff at RCIS-HC have improved their data collection method in 2019 to more accurately count the number of visitors on site, and hopefully collect more specific information about them.

There is a dire need to collect data on an ongoing basis. Tourism managers at the state and Tribal government levels will require additional information on the travelers visiting these destinations in order to analyze trends, seasonality and cycles in demand. By requesting information on socioeconomic aspects, traveler attitudes, demographics, activity participation, mode of transportation, and other trip characteristics, tourism governance bodies will be able to prepare more specific and market-driven tourism strategies for the future.

The COVID-19 pandemic has already deeply affected visitor arrivals to South Dakota, and will continue to do so for the foreseeable future. This does pose significant challenges for the South Dakota tourism industry, but as mentioned above, there will be a higher demand for road trips, and outdoor recreation activities in the coming months, providing an opportunity for South Dakota to capitalize on these resources.

1.9.6 U.S. and International Tour Operators

Tour operators are vital in creating the link between tourism demand and supply. They are crucial in selling tourism products in a region and providing experiences for tourists. There are dozens of tour operators creating and coordinating tour experiences across the state of South Dakota. Most operate around the Black Hills National Forest, providing experiences for tourists to see the national parks and Mount Rushmore. There are, however, far fewer tour operators that coordinate tours on the reservations (see Table 24).

Based on information provided by SD Tourism and desk research, GW IITS has identified 14 tour operators that provide Native American tours on reservations in South Dakota, eight of which are based in South Dakota, primarily in the Black Hills area. The more common reservations for tour operators include Pine Ridge, Rosebud, and Yankton. South Dakota Missouri River Tourism provides tours in the five reservations along the Missouri River: Standing Rock, Cheyenne River, Lower Brule, Crow Creek, and Yankton. Tatanka Rez Tours, based in the Pine Ridge Reservation, is the only Native American-owned licensed tour operator in South Dakota.

There is no online information about tour operators providing experiences on the Flandreau Reservation.

Members of SDNTA have stated that there are individuals on reservations that will give tours and bring visitors to watch/participate in various ceremonies such as sun dances on the reservations. These "tours" are considered informal, as they are not registered with the Tribe or operated by a licensed tour operator on the reservations or in the state of South Dakota.

Most of the tour operators listed in Table 24 provide packages that involve tours around the national parks and monuments while also adding stops at a Tribal Reservation. There is no information available on how many tour operators bring tour groups to visit the Tribal Reservations each year, or on how much their tour groups spend on average during their visits. Additionally, there is no monitoring of how well tour operators understand and respect the traditions and customs of Tribal Nations to ensure they are not exploiting or causing distress to Native American communities.



Courtesy of GW International Institute of Tourism Studies

TABLE 24: Tour Companies That Offer Tours on Tribal Lands in South Dakota

Tour Company	Location	Description of Tour Offerings
Tatanka Rez Tours	Allen, SD	Native American-owned and operated tour business based on the Pine Ridge Reservation
Dave's World Tours	Custer, SD	Offers customized tours across South Dakota
South Dakota Missouri River Tourism	Pierre, SD	Offers customized tours along tribal lands along the Missouri River
Black Hills Open Top Tours	Rapid City, SD	Guided tours to Black Hills Area, Badlands and Wounded Knee
Shebby Lee Hills Tours	Rapid City, SD	Custer State Park, Badlands, and Lewis & Clark Trail
Black Hills Adventure Tours	Rapid City, SD	Focus only on Black Hills; customized tours available
Affordable Adventures	Rapid City, SD	Offers tours to Pine Ridge
Go Native American	Montana	Custom tours, motor coaches, small groups with Indigenous guides
Yellowstone Scenic Tours	Montana	Offers tours in small groups to Yellowstone Park; customizable tours available
The Copper King Mansion	Montana	Bed & Breakfast and mansion tour
Montana Fun Adventures	Montana	Indian Trails, Lewis & Clark Trail, Rocky Mountains, Little Bighorn battlefield
Calamus Outfitters	Nebraska	Ecotourism, wildlife viewing, river cruises
Cherokee Nation	Oklahoma	Museum tours, group tours, historic attractions

Source: South Dakota Department of Tourism



Courtesy of South Dakota Department of Toursim

1.10 COVID-19 Impact and Considerations

The COVID-19 pandemic has caused a dramatic worldwide reduction in tourism, and complete closures of many destinations. The tourism industry has essentially come to a halt, particularly in regards to international travel, due to both fear among travelers of straying too far from home and industry changes making air travel and international travel difficult.

At a global level, the impact has been severe. Between January and April 2020, every country had travel restrictions in place and there was a 44% global reduction in international tourist arrivals.[104] In May the numbers fell further, with a 98% reduction in international tourism numbers.[105] While experts expect tourism recovery to start in 2021, it will likely be years before international tourism numbers return to normal. However, domestic tourism will recover more quickly and can offer opportunities to destinations.

The United States has struggled with high numbers of COVID-19 cases, causing lockdowns in most states between March and May. Aside from the major health impact the virus has caused for the United States, tourism also contributes to 8.6% of the nation's GDP, so the fall in international tourism is being widely felt within the country.[106] The U.S. Travel Association predicts it will take over four years for tourism spend in the United States to return to pre-COVID-19 levels.[107] Some experts predict that 4.6 million tourism employees in the United States will lose their jobs due to the pandemic, with airline and hotel industries being hit particularly hard.[108] Impacts on urban destinations have been worse than rural destinations, due to the large number of people in urban locations and a preference for social distance.

In South Dakota, Governor Kristi Noem declared a state of emergency in March but resisted a general "stay-at-home" order; however, a number of individual municipalities and counties enacted their own restrictions in an attempt to reduce the spread of the disease. At the state level, there was encouragement to abide by social distancing practices, as well as encourage vulnerable populations to shelter at home.

In terms of tourism, South Dakota, like other destinations, noted a major downfall in tourist arrivals earlier in the year, however the statistics are now slowly improving. Hotel occupancy in South Dakota in the month of July was 64.5%—higher than in neighboring states but still 16% lower than July 2019 occupancy.[109] Following a 72.8% drop in U.S. road trips in April, August levels were only 0.5% below previous levels. As a road trip destination, South Dakota will benefit from this swift recovery. State park visitation in South Dakota also looks strong, with 2020 visits to South Dakota parks 28% higher than in 2019 over a similar period.

Native Americans are more vulnerable to this new pandemic due to the social and economic situation in many Tribal Nations. As sovereign entities, the Tribal Nations can issue their own regulations in regards to COVID-19.

The nine Tribal Nations in the state have each implemented different regulations, with some restricting entry and others preferring not to. Cheyenne River Reservation has implemented checkpoints at all entry points, and limited state highways through the reservation to commercial, local and essential service traffic only. Pine Ridge Reservation has also implemented check stations, but through traffic is still allowed.[110] Table 25 provides more detail on the response of South Dakota Tribal Nations to the COVID-19 pandemic as of July 2020.

[104] UNWTO. (2020). New Data Shows Impact of COVID-19 on Tourism as UNWTO Calls for Responsible Restart of the Sector. Retrieved on Sept 4th, from https://webunwto.s3.eu-west-1.amazonaws.com/s3fs-public/2020-06/200622-Barometer-June-EN.pdf

[105] UNWTO. (2020). Impact of COVID-19 on Global Tourism Made Clear as UNWTO Counts the Cost of Standstill. Retrieved on Sept 4th from https://www.unwto.org/news/impact-of-covid-19-on-global-tourism-made-clear-as-unwto-counts-the-cost-of-standstill

[106] McCarthy, N. (2020). COVID-19's Impact on Tourism: Which countries are the most vulnerable? Retrieved on Sept 4th from https://www.forbes.com/sites/niallmccarthy/2020/05/05/covid-19s-impact-on-tourism-which-countries-are-the-most-vulnerable-infographic/#-9b680711906a

[107] U.S. Travel Association. (2020). Travel Forecast, June 2020. Retrieved on Sept 4th from https://www.ustravel.org/system/files/media_root/document/Research_Travel-Forecast_Summary-Table.pdf

[108] Becker, E. (2020). How Hard will the Coronavirus Hit the Travel Industry? Retrieved on Sept 4th From https://www.nationalgeographic.com/travel/2020/04/how-coronavirus-is-impacting-the-travel-industry/

[109] South Dakota Tourism. (2020). COVID-19 Research. Retrieved on Sept 4th from https://sdvisit.com/sites/default/files/2020-08/COVID-19%20WEEKLY%20UPDATE_082820.pdf

[110] South Dakota Tourism. (2020). COVID-19 Travel Restrictions on Tribal Lands in South Dakota. Retrieved on Sept 4th from https://sdvisit.com/covid-19-travel-restrictions-tribal-lands-south-dakota

TABLE 25: Response from the Tribal Nations of South Dakota to the COVID-19 Pandemic

Tribal Nation	Enforcement	Regulation
Cheyenne River Sioux Tribe	Border checkpoints; suspension of hunting & fishing; suspension of events; restriction of movement; curfew	Emergency Command Center
Crow Creek Sioux Tribe	Public facility cleaning; closure of schools and courts; public events postponed; restrictions on movement	Administrative Order #1 (CV 20-01) Smart911 app
Flandreau Santee Sioux Tribe	Reduced public service operations; official travel suspended; school closures	Executive Order 2020-01 March 24 Memorandum
Lower Brule Sioux Tribe	Public Health State of Emergency	Resolution 2020-104
Oglala Sioux Tribe	Total closure of Tribal Nation to nonresidents (except as allowed by Ordinance)	Ordinance 20-28
Rosebud Sioux Tribe	Stay-at-Home orders; State of Emergency; curfews	Resolution 2020-75
Sisseton Wahpeton Oyate	State of Emergency	March 26 Executive Memo
Standing Rock Sioux Tribe	Stay-at-Home orders; curfews	March 30 Executive Order April 2 Public Notice
Yankton Sioux Tribe	State of Emergency	Resolution 2020 - 40

Source: Official Tribal Nation websites

1.11 Key Strengths, Challenges and Opportunities

There are key strengths, challenges and opportunities for Native American tourism development in South Dakota drawn from the comprehensive situation analysis.

Key Strengths

1. **Tourism assets:** A rich mix of tourism product assets, including 145 existing natural, cultural and heritage attractions and events as well as potential agritourism and culture assets.
2. **Proximity to mainstream tourism hubs:** Some Tribal reservations are located near existing major tourism and business hubs in South Dakota, connected by major highways and tourism routes.
   a. Black Hills & Rapid City Area (Western Hub): Pine Ridge & Rosebud Reservations
   b. Pierre/Fort Pierre Area (Central Hub): Crow Creek, Cheyenne River, and Lower Brule Reservations
3. **Resilience:** Widespread entrepreneurship, albeit mostly informal and small-scale, occurring in Native American communities throughout South Dakota demonstrates resilience.
4. **Emerging destinations:** Increasing tourism arrivals on the Pine Ridge Reservation (though they are still low); the Oglala Sioux Tribe, Sisseton Wahpeton Oyate, and Standing Rock Sioux Tribe are currently exploring establishment of tourism offices.
5. **Partnership support:** Extensive network of non-Tribal organizations, educational institutions, business development entities and state entities support Native American tourism development. These include but are not limited to:
   a. SD Department of Tourism
   b. SD Department of Tribal Relations
   c. SD Arts Council
   d. U.S. Small Business Administration
   e. USDA Rural Development
   f. Small Business Development Center
   g. South Dakota Missouri River Tourism

   A range of Tribal colleges and tertiary education institutions offer degrees in areas relevant to tourism that can help support workforce development.
6. **Unity:** Consensus among community leaders and other key stakeholders to work together through the SDNTA—the Očhéthi Šakówiŋ "Seven Council Fires" network to develop tourism as a catalyst for economic growth.

Key Challenges and Opportunities

CHALLENGES	OPPORTUNITIES
Most existing and potential attractions for tourism require further development. There are few existing Native American tourism experiences and tours offered in South Dakota. Due to COVID-19, many Tribal Nations are not receiving visitors. It is unknown when this will change.	**Create and deliver iconic Native American experiences.**
Most existing and potential tourism attractions on reservations are not market ready and need further development. Signs and directions are inadequate, and there is little sense of arrival in main towns. Public restroom facilities are inadequate. There are insufficient accommodation options on or near reservations.	**Improve infrastructure and placemaking.**
There are very few tourism businesses, and most are not market ready. Service and quality online ratings for accommodations and restaurants are moderate and limited. Entrepreneurs do not have access to viable financing and technical support.	**Enable tourism business success and viability.**
Community and Tribal leadership readiness and understanding of the market and potential opportunities of tourism is low. There is a need for hospitality and skills training in the Tribal Nation workforce.	**Prepare community and skilled workforce in tourism.**
Online trip planning information is limited. There is limited flow of visitors occurring between the major tourism hubs in South Dakota and Tribal Nations Complex and sensitive relationship between Native American and non-Native American communities and organizations, including at a tourism level. Tourism businesses are not organized to promote tourism in the nine Tribal Nations.	**Increase awareness of Native American tourism offerings in South Dakota among key market segments.**
There is limited collaboration among Tribal Nations and tourism stakeholders on tourism development. There are no Tribal government tourism offices or positions directed to manage and promote tourism in the Tribal Nations.	**Manage tourism collaboratively.**



2. 2025 VISION

Where will we be in 2025?

This section of the plan presents the strategic framework for developing Native American tourism in the Tribal Nations in South Dakota. It outlines the vision, goals, strategies, expected outcomes and potential impact of the plan.

Courtesy of South Dakota Department of Toursim

2.1 Vision & Guiding Principles

There is consensus among Native American leaders and other key stakeholders to work together through the Native American Tourism Alliance—the Očhéthi Šakówiŋ "Seven Council Fires" network—to develop tourism as a catalyst for economic growth.

The main elements of the shared vision for Native American tourism in South Dakota crafted by SDNTA participants in October 2019 are:

- **UNITY:** reunification of the Očhéthi Šakówiŋ Oyate through shared history, commonalities, and collaboration on developing regional tourism
- **PRESERVATION:** promotion of art and culture in order to enhance self-identity and pride as well as preserve the culture, including language and traditional knowledge
- **WOKSAPE:** recognizing Elders as the driving force of traditional knowledge and wisdom in the development of regional tourism and educating the youth to be stewards of the language and culture
- **EDUCATION:** creating cross-cultural bridges and educating the World about Native American communities
- **SELF-SUFFICIENCY:** providing opportunities for Tribal Nations to become self- sufficient and create pathways to enhance livelihood

SDNTA members believe firmly that tourism can help to promote and maintain the Lakota values of Respect, Compassion, Honesty, Generosity, Humility, and Wisdom.

Furthermore, achieving this overarching goal will help to re-engage the Očhéthi Šakówiŋ Oyate as well as reinforce community pride and culture.

Section 2.2 presents these goals in greater detail and outlines corresponding strategies for achieving these goals.

VISION By 2025, Tribal Nations are actively working with industry and state and federal partners to develop Native American tourism experiences that are attracting visitors, encouraging them to stay and experience more in Tribal Nations.

To achieve this vision, the main goals are to:

1. **Create and deliver iconic Native American experiences**
2. **Improve infrastructure and placemaking**
3. **Enable tourism business success and viability**
4. **Prepare both community and a skilled workforce for tourism**
5. **Increase awareness of Native American tourism offerings in South Dakota among key market segments**
6. **Manage tourism collaboratively**

2.2 Goals and Strategies

2.2.1 Create and Deliver Iconic Native American Tourism Experiences

Tourism product development is critical since Tribal Nations have limited market ready tourism experiences and tours. Prior to 2020, wacipis and other large Native American events, along with hunting and fishing, were some of the more popular and market ready tourism experiences available in Tribal Nations. Moving forward, particular focus will need to be given to nature, outdoor recreation and agritourism experience development, as they will be most COVID-19 compliant in the short term.

Additionally, in the medium term, cultural heritage and culture experiences and events should be developed and included in tours and experiences. There are identified opportunities for greater incorporation of cultural heritage with nature and outdoor recreation experiences.

The overarching goal and corresponding strategy for tourism product development in Tribal Nations are outlined in Table 26.

TABLE 26: Strategies for creating and delivering iconic Native American tourism experiences

1. GOAL	STRATEGY
Create and deliver iconic Native American tourism experiences	1.1 Develop authentic and differentiated Native American products and experiences that connect Tribal Nations along existing tourism routes. 1.2 Develop Native American tourism experiences that meet current (COVID-19) realities and future market demands.

2.2.2 Improve Infrastructure and Placemakings

While Tribal Nations have a diverse mix of 145 existing tourism attractions on and near reservations and other potential assets, most existing attractions need significant development to become market ready. Tribal Nations will need to work with private sector and state and federal partners to create a compelling visitor experience that addresses the following areas for improvement:

- Accessibility and wayfinding to attractions and experiences
- Tourism infrastructure, such as a wider range of accommodations and public restrooms, as well as public services that will benefit residents and visitors
- Appeal and aesthetics of reservations as places to live and visit

Special attention will be given in the short term to developing tourism attractions and lodging facilities that comply with COVID-19 protocols and guidelines.

Since tourism development is nascent in most Tribal Nations, it is important that development is guided by community input and upholds the values and needs of Native American communities.

2.2.3 Enable Tourism Business Success and Viability

The current ecosystem for Native American tourism enterprises in South Dakota is limited since tourism is nascent. Delivering on the goals for tourism development will require supporting entrepreneurs over time to develop the needed amenities, tourism products and experiences, and services. Supporting local entrepreneurship and local ownership in tourism also ensures distribution of economic benefits to destination residents.

In Tribal Nations, there is limited access to financing and business development support for micro and small tourism enterprises (MSTEs). Even the most developed tourism attractions and businesses face significant hurdles in accessing new capital and development programs to improve their businesses and provide training for staff. Enhancing support to increase the number of market-ready businesses is a top priority.

There is an identified need for financing and ongoing business development support as key considerations for enabling entrepreneurship. It will be important to establish well-defined and ongoing programs to provide financing and technical assistance in order to encourage tourism entrepreneurship.

TABLE 27: Strategies for improving infrastructure and placemaking

2. GOAL	STRATEGY
Improve infrastructure and placemaking	2.1 Develop new attractions and enhance existing attractions needed for themed products, experiences and events. 2.2 Develop a range of lodging and facilities that appeal to South Dakota's main travel market segments. 2.3 Enhance the welcoming feel of main towns and priority attractions. 2.4 Develop public-private partnerships to fund development and/or enhancements at priority attractions.

TABLE 28: Strategies for enabling tourism business success and viability

3. GOAL	STRATEGY
Enable tourism business success and viability	3.1 Support market readiness of Micro and Small Tourism Enterprises (MSTEs). 3.2 Provide affordable financing to help start and grow MSTEs.



Courtesy of GW International Institute of Tourism Studies

2.2.4 Prepare Community and Skilled Workforce in Tourism

As tourism increases in Tribal Nations throughout South Dakota, it will be especially important to build support and buy-in for tourism among Tribal leadership and communities. Communities should be made aware of both positive and negative potential impacts of tourism, and educated on tourism best practices and the role community members play in providing positive experiences to visitors. Involving both community members and Tribal leadership early in the process will make it easier to involve these groups in tourism development and move forward with strategies to engage tourists.

One of the greatest community benefits of tourism is its labor-intensive nature, making it a significant source of employment in destinations. Tourist accommodation, attractions, sites and tour operators all require a workforce to operate, making the availability of skilled and trained workers an essential element for the success of tourism in these Tribal Nations.

2.2.5 Increase Awareness of Native American Tourism Offerings in South Dakota among Key Market Segments

In 2019, South Dakota received 14.5 million visitors.[111] The flow of visitors from the major tourism hubs to Tribal Nations is very limited. Additionally, there is limited information available online regarding what travelers can expect and things to do in Tribal Nations.

To overcome these challenges and draw visitors to the area, Tribal Nations need to develop this region as a destination for Native American tourism in the U.S. By considering the region's branding at this early stage, the Tribal Nations can intentionally design and build positive visitor perceptions of the destination. The branding of a destination should go beyond listing the activities and sites that are available—it should create and convey a sense of place.

The development of the region's brand should be intentionally designed to attract high-value and diversified market segments; targeting those with specific interests that are aligned with the destination's offerings. As the brand is developed, the region should take steps to distinguish itself and raise awareness of visitors through targeted and intentional promotion.

Strategic partnerships between Native American and non-Native American communities and organizations should also be formed to foster relationships with and understanding of Native American communities in gateway communities, and to enlist support for Native American tourism promotion.

TABLE 29: Strategies for preparing community and skilled workforce in tourism

4. GOAL	STRATEGY
Prepare community and skilled workforce in tourism	4.1 Build tribal leadership and community support and buy-in for tourism. 4.2 Improve the quality of product and service delivery.

TABLE 30: Strategies to increase awareness of Native American tourism offerings among key market segments

5. GOAL	STRATEGY
Increase awareness of Native American tourism offerings in South Dakota among key market segments	5.1 Develop the region as a destination. 5.2 Develop strategic partnerships to foster a greater understanding of Native American communities and promotion of Native American tourism. 5.3 Reach diversified market segments.

[111] South Dakota Department of Tourism. (2020). 2019 Statistics. Retrieved from https://sdvisit.com/

TABLE 31: Strategies for managing tourism collaboratively

6. GOAL	STRATEGY
Manage tourism collaboratively	6.1 Establish tourism management and plan implementation mechanisms. 6.2 Attract investors and plan implementation partners.

2.2.6 Manage Tourism Collaboratively

Tourism development will touch many aspects of Native American communities and involve many organizations, including local, state and federal agencies, private sector, civil society and academia. For tourism to succeed in Tribal Nations, it is essential to establish tourism leadership that can guide the development process and facilitate coordination and collaboration among all stakeholders, to ensure these Nations become desirable destinations and remain pleasant places to live.

Currently, there is very limited cooperation and collaboration occurring between Tribal Nations keen to develop tourism as a pillar of economic development.

2.3 Economic Impacts of Tourism

The overarching five-year aim will be to develop Native American tourism opportunities in South Dakota. When fully implemented, this plan will provide tangible benefits to Tribal Nations, including economic, infrastructure, and investment benefits.

Data collection on visitor flows is very limited. Published data and reporting on the economic impact of tourism does not exist for the Tribal Nations in South Dakota.

This section of the plan describes the economic impacts of tourism in Tribal Nations based on the available information from a range of sources. Since the Pine Ridge Reservation has the most comprehensive data set available, a case study is presented illustrating how a limited data set can be used to gain insights about the actual and forecasted economic impact of tourism at a Tribal Nation level. The economic impacts of tourism in all other Tribal Nations is also outlined based on available data.

2.3.1 Pine Ridge Reservation

This case study will first estimate the baseline for tourism activity in the Tribal Nation and then provide a forecast for the next seven years. The baseline year is 2019. The key aspects of economic impact that will be assessed are:

- Tourism expenditure – the total consumption expenditure made by a visitor during a trip and stay at the Tribal Nation
- Tourism tax revenue – the portion of the Tourism Tax that Tribal governments retain based on their agreements with the State of South Dakota.

A. Visitor Arrivals

Pine Ridge receives several types of visitors:

- Leisure visitors whose main purpose is relaxation and escape from everyday life. This market segment also includes outdoor recreation enthusiasts mostly interested in hunting and fishing. This is the only market segment for which there is some data.
- Gaming visitors whose main purpose is gaming at the two casinos. There is currently no available data on the number of gaming visitors. It is expected that gambling is the only activity during their trip and that very few will also engage in leisure tourist activities in Pine Ridge.
- Tribal members whose main purpose for coming is to visit friends and relatives (VFR). While a large share of this group is staying with friends or family, a portion of this market is expected to stay in paid accommodation. Much of their visitation is centered around major events in the summer months and during the holidays. The annual wacipi attracts between 4,000 and 6,000 people in total, of which an estimated 25% are visitors. Other large events that attract VFR are fairs, rodeos, and sporting events.

Pine Ridge collects a number of data points on the number of leisure visitors only. The following data is available:

- Visitor data at the Pine Ridge Area Chamber of Commerce (PRACC), the Red Cloud Indian School Heritage Center (RCIS-HC) and White River Visitor Center. Visitor data is also collected at Badlands National Park (see Table 32).
- SD Tourism uses mobile phone data collected by Arrivalist to track visitation. The data allows tracking on travelers are coming from, where they visit, and how they move around. The number only includes visitors who stay a minimum of two hours, travel at least 75 miles and are not considered commuters. In 2019, cross-panel Arrivalist data showed that 9% of all Badlands National Park visitors also pass through or visited Pine Ridge Reservation.

TABLE 32: Available Data for Pine Ridge, 2017–2019

Year	PRACC	RCIS-HC	White River Visitor Center	Badlands National Park
2017	n/a	11,279	n/a	1,054,325
2018	2,233	10,511	15,000	1,008,942
2019	n/a	9,592	n/a	970,998

Note: n/a = data not available
Sources: PRACC, RCIS-HC.

Based on the data available, the minimum number of leisure visitors Pine Ridge received in 2019 was 9,592 (annual number of visitors at RCIS-HC). According to Arrivalist data, 9% of the visitors to Badlands National Park also visited Pine Ridge. A large share of these people are expected to only pass through Pine Ridge, without stopping long enough to be considered Pine Ridge leisure visitors. The Pine Ridge Chamber of Commerce estimates that only 3% of visitors to Badlands National Park visit at least one of the attractions in Pine Ridge. Based on these numbers, following are two baseline scenarios for leisure visitors in Pine Ridge.

Scenario 1: Of all Badlands visitors, 3% also visit Pine Ridge Reservation for leisure purposes. In 2019, the total number of Badlands National Park visitors was 970,998. The total number of leisure visitors to Pine Ridge is then estimated at **29,130** (3% of 970,998).

Scenario 2: The Red Cloud Indian School Heritage Center is considered a must-see site in Pine Ridge. Between 2017 and 2019, it received an average of 10,460 visitors. The White River Heritage Center received 15,000 visitors in 2018. Based on these numbers, the number of leisure visitors in Pine Ridge is estimated at **12,750** (the average between 10,460 and 15,000).

Now that the baseline has been calculated, we can use these figures to forecast visitation for 2020–2027. Just like elsewhere in the country, the COVID-19 pandemic has had a tremendous impact on tourism activity in Pine Ridge. The reservation has been closed to outside visitors since March 2020 and this is expected to continue to at least the end of 2020. Based on the assumption that Pine Ridge will be open to visitors by early 2021, return to pre-crisis arrivals of leisure visitors is expected by the end of 2023.

If fully implemented, the proposed actions in this plan should support post-crisis recovery as well as generate additional tourist activity beyond the pre-crisis growth trajectory. Table 33 provides an estimated forecast of leisure visitor arrivals between 2020 and 2027 based on the two baseline scenarios. These numbers are based on the current forecast and the ability of the Tribal Nation to return to regular accessibility by early 2021.

The 2015 report by the Kirwan Institute identified tourism as one of the sectors that could stimulate the number of times a dollar is circulated in the Pine Ridge economy.[112] Tourism is generally seen as one of the sectors that can stimulate not only direct impacts but also indirect and induced impacts. The Badlands National Park was considered one of the main opportunities to spur tourism development in the reservation. This could help support the arts community by bringing customers to Pine Ridge, as well as support growing the number of enterprises within the borders of the reservation.

TABLE 33: Projected Leisure Visitor Arrivals, 2020–2027

	Baseline (2019)	2020 (e)	2021 (f)	2022 (f)	2023 (f)	2024 (f)	2025 (f)	2026 (f)	2027 (f)
Scenario 1	29,130	2,000	8,000	20,000	29,130	32,000	34,000	36,000	38,000
Scenario 2	12,750	750	4,000	8,000	12,750	13,500	14,750	16,500	18,000

Notes: (e)= estimate; (f) = forecast
Source: GW IITS calculations based on Tourism Economics data

[112] Kirwin Institute (2015) Strengthening the Pine Ridge Economy A Regional Equity and Opportunity Assessment. Available at: https://www.policylink.org/sites/default/files/PineRidge_FINAL.pdf

B. Tourism Expenditures

The baseline estimate for expenditures by the leisure market is based on the two scenarios for the number of visitors as well as the following assumptions:

- The per-person-per-day average spending for leisure visitors is $108.30. This is calculated and used by the SD Tourism as the average for South Dakota.
- The SD Tourism estimates the average length of stay of visitors in South Dakota at 2.03 nights. Based on expert interviews, the average length of stay for leisure visitors at Pine Ridge is estimated at one night.

Table 34 indicates that 2019 baseline total leisure visitor expenditures in Pine Ridge may range from $1.3 million to $3.1 million. These scenarios for the baseline tourism expenditures are only for leisure tourists and do not include expenditures by the gaming, VFR and other market segments.

Table 35 shows the projected visitor expenditures up to 2027. The figures are based on the two baseline visitor arrival scenarios and constant average daily expenditures and length of stay.



Courtesy of South Dakota Department of Toursim

TABLE 34: Baseline Visitor Arrivals Scenarios for Pine Ridge, 2019

	Number of Visitors	Average Daily Expenditures per Person	Length of Stay	Total Visitor Expenditures
Scenario 1	29,130	$108.30	1.00	$3,154,779
Scenario 2	12,750	$108.30	1.00	$1,380,825

Source: Pine Ridge Area Chamber of Commerce, GW International Institute of Tourism Studies

TABLE 35: Projected Leisure Visitor Expenditures for Pine Ridge (in US$), 2020–2027

	Baseline (2019)	2020 (e)	2021 (f)	2022 (f)	2023 (f)	2024 (f)	2025 (f)	2026 (f)	2027 (f)
Scenario 1	3,154,779	216,600	866,400	2,166,000	3,154,779	3,465,600	3,682,200	3,898,800	4,115,400
Scenario 2	1,380,825	81,225	433,200	866,400	1,380,825	1,462,050	1,597,425	1,786,950	1,949,400

Source: Pine Ridge Area Chamber of Commerce, GW International Institute of Tourism Studies

TABLE 36: : Tourism Tax Reporting Oglala Lakota County, FY 2020

County	Category	Taxable Sales	Tax Due
Oglala Lakota County	Other	$9,461.42	$141.93

Source: South Dakota Sales and Use Tax Reporting System Returns filed for fiscal year 2020

C. Tax Revenue

The South Dakota Tourism Tax Rate is 1.5% and applies to the gross receipts of:

- Hotels and Lodging Establishments
- Campgrounds
- Motor Vehicle Rentals
- Recreational Equipment Rentals
- Recreational Services
- Spectator Events
- Visitor Attractions
- Visitor-Intensive Businesses (open between June and September)

The Oglala Sioux Tribe has a tourism tax agreement as part of their Special Jurisdiction status in South Dakota. According to the South Dakota Sales and Use Tax Reporting system, Oglala Lakota County reported about $9,500 in tourism taxable sales between June 2019 and June 2020. The Tribal Nation retained 96% of the $142 in tourism tax collected. This figure is exceptionally low and indicates that the tourism tax may not be consistently applied in Pine Ridge.

If the tourism tax were fully applied on all expenditures by leisure visitors, the tax due in 2019 would have been $47,322 under baseline scenario 1 and $20,712 under scenario 2. Table 37 shows the projected collected tourism tax from leisure visitors from 2020 to 2027.

Of the tourism tax collected, 96% is retained by the Tribal Nation. Based on the projected tourism tax collected, Table 38 shows the forecasted amounts of tourism tax that could be retained.

TABLE 37: Projected Tourism Tax Collected (in US$) from Leisure Visitors by Pine Ridge, 2020–2027

	Baseline (2019)	2020 (e)	2021 (f)	2022 (f)	2023 (f)	2024 (f)	2025 (f)	2026 (f)	2027 (f)
Scenario 1	47,322	3,249	12,996	32,490	47,322	51,984	55,233	58,482	61,731
Scenario 2	20,712	1,218	6,498	12,996	20,712	21,931	23,9615	26,804	29,241

Notes: (e)= estimate; (f) = forecast
Source: GW International Institute of Tourism Studies

TABLE 38: Projected Retained Tourism Tax from Leisure Visitors Retained by Pine Ridge, 2020–2027

	Baseline (2019)	2020 (e)	2021 (f)	2022 (f)	2023 (f)	2024 (f)	2025 (f)	2026 (f)	2027 (f)
Scenario 1	45,429	3,119	12,476	31,190	45,429	51,984	53,024	56,143	59,262
Scenario 2	19,884	1,169	6,238	12,476	19,884	21,054	23,003	25,732	28,071

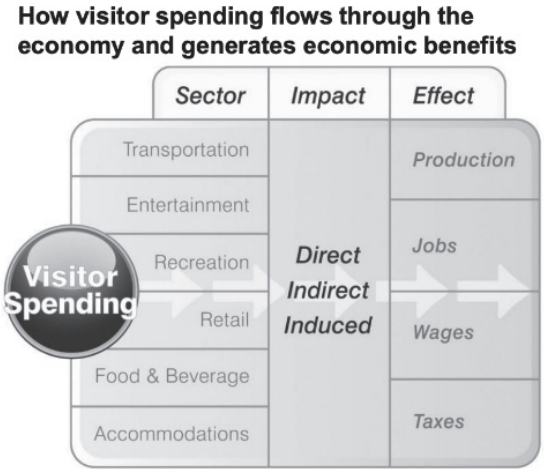
Notes: (e)= estimate; (f) = forecast
Source: GW International Institute of Tourism Studies

2.3.2 Economic Impacts of Tourism in Tribal Nations

The section outlines the economic impact of tourism in all nine federally recognized Tribal Nations in South Dakota. County-level data on tourism expenditures, jobs, wages and tax revenue from Tourism Economics is used to estimate the economic impact of tourism in each Tribal Nation.

Figure 24 identifies the three main components Tourism Economics uses to measure the full contribution of the tourism sector in South Dakota. The direct economic benefits of tourism consist of expenditures by visitors during their stay in the destination—for example, spending on hotels, restaurants, tours and other services. The indirect benefits of tourism are the value of the services and products that tourism businesses purchase from their suppliers. The induced impact measures the salaries and wages of employees in the tourism sector, which they use to purchase goods and services.

FIGURE 24: Direct, Indirect and Induced Contribution of Tourism to the Economy



Source: Tourism Economics

The SD Tourism uses data from the firm Tourism Economics to estimate the economic impact of tourism in the state. Their analysis measures the economic impact of visitors to the State of South Dakota, including:

- Day trips and overnight visitors
- Domestic, Canadian and overseas visitors
- Resident and nonresident travel

Domestic visitor expenditure estimates are provided by DK Shifflet's representative survey of U.S. travelers. These are broken out by sectors (lodging, transport at destination, food & beverage, retail, and recreation), by purpose (business and leisure), and by length of stay (day and overnight). Tourism Economics (TE) then adds and cross-checks several categories of spending:

- International visitor spending (source: NTTO, TE)
- Canadian visitor spending (source: Statistics Canada, TE)
- Spending on air travel which accrues to South Dakota airports and locally based airlines
- Gasoline purchases by visitors (source: TE calculation)
- Recreational second home expenditures (source: U.S. Census Bureau)
- Lodging performance (Smith Travel Research)
- Local-level lodging tax data
- Sales tax by industry (South Dakota Department of Revenue)
- Industry-by-industry employment and personal income (Bureau of Economic Analysis and Bureau of Labor Statistics)

A. Visitor Arrivals

There is no specific data available on visitor numbers at attractions in the other Tribal Nations nor is there other significant data available on visitor volumes to estimate the number of arrivals in the other Tribal Nations.

B. Expenditures

In 2019, visitors to South Dakota spent a total of $4.1 billion, an increase of 2.8% compared to the previous year. The value added by sectors directly interacting with visitors was $1.5 billion, accounting for 3.1% of total GDP in South Dakota in 2019. That same year, the total value-added economic impact of tourism in South Dakota was $2.7 billion, or 5.2% of the state's economy. In 2019, the average per-person-per-day spending for leisure visitors in South Dakota was $108.30. In that same year, the average length of stay for visitors in South Dakota was 2.03 nights.

Table 39 presents estimates of direct tourism expenditures in the different Tribal Nations. The estimates are based on county-level data, grouped and adjusted to reflect tourism activity in the different Tribal Nations. The Lodging category includes visitor spending in the accommodation sector, which also comprises food and other services provided by hotels and similar establishments. The F&B (Food and Beverage) category includes all visitor spending at bars and restaurants. Recreation includes visitor spending on arts, entertainment, and recreation activities. Tourism Economics also includes the categories Shopping (visitor spending at all retail sectors) and Transportation (which includes air transportation, local transport services, and gasoline). As these categories are considered less relevant for tourism expenditures in the Tribal Nations, they have been omitted from the total expenditures. This table presents direct expenditures from all market segments, including leisure, gaming and visiting friends and relatives. Currently, the leisure market is expected to represent a small portion of overall visitor spending.

It is important to note that Tourism Economics uses modelling to estimate visitor expenditures at a county level. The figures presented in Table 39 are therefore based on the modelling estimates, and not actual reported figures.

TABLE 39: Estimated Tourism Direct Expenditures in the Tribal Nations, 2019

Tribal Nation	Lodging	F&B	Recreation	Total Visitor Spending
Cheyenne River Sioux Tribe	960,000	1,950,000	730,000	3,640,000
Crow Creek Sioux Tribe	2,064,000	728,000	512,000	3,304,000
Flandreau Santee Sioux Tribe	33,180	12,390	4,130	49,700
Lower Brule Sioux Tribe	1,773,000	941,500	1,134,500	3,849,000
Rosebud Sioux Tribe	940,000	870,000	410,000	2,220,000
Oglala Sioux Tribe	5,104,600	6,244,400	1,787,000	13,136,200
Sisseton Wahpeton Oyate	3,711,000	4,162,500	925,000	8,798,500.
Standing Rock Sioux Tribe	1,100,000	1,880,000	800,000	3,780,000
Yankton Sioux Tribe	1,628,000	816,000	698,000	3,142,000

Source: GW calculations based on Tourism Economics data

It can be noted that there is a difference between the figures calculated for Pine Ridge in the previous section and the total visitor spending figure in Table 39. In the previous section, leisure visitor expenditures for 2019 were estimated to range between $1.3 million and $3.1 million. In the above table, total visitor spending is estimated at $13.1 million. This difference can be attributed to:

- Table 39 captures all visitor spending including that from gaming, VFR and other segments such as hunting and fishing.
- The level of modeling that Tourism Economics uses to determine county-level tourism impact which may not be reflective of local realities.

C. Employment

Tourism industry sales directly supported 37,871 jobs in South Dakota in 2019. The tourism industry supported a total of **55,157 jobs** (direct, indirect and induced), representing 8.8% of all South Dakota employment. **Tourism Economics estimates that, on average, spending from 380 visitors supports one direct tourism job**.

It is important to also note that Tourism Economics uses modelling to estimate jobs and labor income at a county level. The figures presented in Table 40 are therefore based on the modelling estimates, and not actual reported figures.

TABLE 40: Estimated Tourism-Linked Jobs and Labor Income in the Tribal Nations, 2019

Tribal Nation	Direct Jobs	Total Jobs	Direct Labor Income	Total Labor Income
Cheyenne River Sioux Tribe	66	114	$1,410,000	$3,120,000
Crow Creek Sioux Tribe	51.2	64.8	$1,176,000	$1,768,000
Flandreau Santee Sioux Tribe	0.7	1.1	$11,620	$26,600
Lower Brule Sioux Tribe	64.7	90.1	$1,475,000	$2,185,000
Oglala Sioux Tribe	150.2	216.3	$3,123,200	$4,964,000
Rosebud Sioux Tribe	101	136	$2,170,000	$3,390,000
Sisseton Wahpeton Oyate	168.4	221.6	$2,621,500	$4,445,500
Standing Rock Sioux Tribe	20	34	$400,000	$900,000
Yankton Sioux Tribe	54.6	78	$986,000	$1,814,000

Source: GW calculations based on Tourism Economics data

TABLE 41: Estimated Reported Tourism Tax by Tribal Nation, FY 2020

Tribal Nation	Taxable Sales	Tax Due
Cheyenne River Sioux Tribe	$36,008	$540
Crow Creek Sioux Tribe	$23,524	$353
Oglala Sioux Tribe	$93,320	$219
Rosebud Sioux Tribe	$10,642	$160
Standing Rock Sioux Tribe	–$7,760*	–$115*

Source: GW calculations based on South Dakota Department of Revenue data
*Note: * does not include North Dakota*

D. Tax Contribution

Table 41 provides an indication of tourism taxable sales and the tax due in the five Tribal Nations that have tourism tax collection agreements with the state. The estimates are based on county-level data, grouped and adjusted to reflect tourism activity in the different Tribal Nations.

Data on the gaming sector is collected by the American Gaming Association (AGA). According to their 2016 data, the tribal gaming industry in South Dakota ranked 21st across all U.S. states in terms of value of sales. As seen in Table 42, the total value of sales increased by 9.1% and the total wages by 16.2% between 2014 and 2016. The gaming-related payments by Tribes to federal, state, and local governments decreased by 36.3% during the same period.

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TABLE 42: : Tribal Gaming Economic Impact, 2014 and 2016

Year	Number of Gaming Gaming Facilities	Value of Sales	Jobs	Wages	Tax Revenue & Revenue Share Payments*
2014	14	$266,704,691	2,762	$87,349,726	$54,292,453
2016	14	$291,087,039	3,063	$101,462,064	$34,579,237

Source: American Gaming Association
**Revenue Share Payments consist of agreed-upon gaming-related payments by Tribes to federal, state, and local governments.*

Courtesy of South Dakota Department of Toursim



3. ACTION PLAN

How will we get there?

This section of the plan outlines the recommended strategic priorities including 43 priority initiatives. Partnerships will be critical for successful plan implementation. Steps for the development of priority attractions, traveler routes, accommodations, and public facilities are outlined. Education and training programs are presented to prepare existing tourism businesses, entrepreneurs, Tribal Leaders, and communities for the development and management of tourism in the new COVID-19 reality. Furthermore, a proposed local destination management framework and key performance indicators for monitoring plan implementation are detailed.



Courtesy of South Dakota Department of Toursim

NATDMP Action Plan At A Glance

TABLE 43: NATDMP Action Plan at a Glance

Goals	Strategies	Priority Initiatives	Implementation Time Horizon	Implementation Partners
1. Create and deliver iconic Native American tourism experiences	1.1 Develop authentic and differentiated Native American products and experiences that connect Tribal Nations along existing tourism routes	1. Develop themed tourism experiences in and around Standing Rock, Cheyenne River, Crow Creek, Lower Brule, and Yankton Reservations that are located along the Native American Scenic Byway	Short to Medium Term: Years 1–4	Bureau of Indian Affairs, SD Tourism, Tribal Governments, SD Missouri River Tourism, Tourism businesses
		2. Revitalize the Oyate Trail by developing themed tourism experiences across Pine Ridge, Rosebud, and Yankton Reservations	Short to Medium Term: Years 1–4	Bureau of Indian Affairs, SD Tourism, Tribal Governments, SD Missouri River Tourism, Tourism businesses
		3. Revitalize the Yellowstone Trail by developing themed tourism experiences across the Lake Traverse, Standing Rock and Cheyenne River Reservations	Short to Medium Term: Years 1–4	Bureau of Indian Affairs, SD Tourism, Tribal Governments, SD Missouri River Tourism, Tourism businesses
		4. Develop themed tourism experiences across the Flandreau and Lake Traverse Reservations that are located along I-29	Short to Medium Term: Years 1–4	Bureau of Indian Affairs, SD Tourism, Tribal Governments, SD Missouri River Tourism, Tourism businesses
		5. Develop a summer Native American Events tourism circuit across all nine Tribal Nations	Short to Medium Term: Years 2–4	Bureau of Indian Affairs, SD Tourism, Tribal Governments, SD Missouri River Tourism, Tourism businesses
	1.2 Develop Native American tourism experiences that meet current (COVID-19) and future market demands	6. Train Native American entrepreneurs to develop experience ideas into virtual and in-destination tours	Short to Medium Term: Years 1–3	SD Tourism,Chambers of Commerce, U.S. Small Business Administration, Thunder Valley Community Development Corporation, Lakota Youth Development, First Peoples Fund, Four Bands Community Fund, Dakota Indian Foundation, Small Business Development Center, Tribal Colleges
		7. Develop and implement community and visitor COVID-19 safety and security preparation program	Short Term: Years 1–2	Tribal Governments, Tribal Game, Fish & Parks/Recreation, Tribal Dept of Wildlife Resources & Management, Chambers of Commerce, Tribal Colleges
		8. Create a network of certified Native American tour guides across all nine Tribal Nations	Medium Term: Years 3–5	Alliance of Tribal Tourism Advocates, SD Missouri River Tourism, Chambers of Commerce, Tribal Colleges

Goals	Strategies	Priority Initiatives	Implementation Time Horizon	Implementation Partners
2. Improve infrastructure and placemaking	2.1 Develop new attractions and enhance existing attractions needed for themed products, experiences and events	9. Develop new and support enhancement of existing nature & outdoor recreation anchor attractions along tourism routes	Short Term: Years 1–2	SD Tourism, SD Game Fish & Parks, SD Governor's Office of Economic Development, Tribal Game, Fish & Parks/Recreation, Tribal Dept of Wildlife Resources & Management, Tribal Departments of Economic Development & Planning, Chambers of Commerce, U.S. Small Business Administration, USDA Rural Development
		10. Develop new and support enhancement of existing agritourism anchor attractions along tourism routes	Short t Term: Years 1–2	SD Tourism, SD Game Fish & Parks, SD Governor's Office of Economic Development, Tribal Dept of Wildlife Resources & Management, Tribal Departments of Economic Development & Planning, Chambers of Commerce, U.S. Small Business Administration, USDA Rural Development, Ag businesses
		11. Develop new and support enhancement of existing cultural heritage anchor attractions along tourism routes	Medium Term: Years 3–4	SD Tourism, SD Governor's Office of Economic Development, SD Arts Council, Tribal Historic Preservation Office, Tribal Departments of Economic Development & Planning, Chambers of Commerce, U.S. Small Business Administration, First Peoples Fund
		12. Develop new and support enhancement of existing living culture anchor attractions along tourism routes	Medium Term: Years 3–4	SD Tourism, SD Governor's Office of Economic Development, SD Arts Council, Tribal Historic Preservation Office, Tribal Departments of Economic Development & Planning, Chambers of Commerce, U.S. Small Business Administration, First Peoples Fund
		13. Develop new and support enhancement of existing events throughout the Tribal Nations	Medium Term: Years 3–4	SD Tourism, SD Arts Council, Tribal Event Planning Committees, Tribal Departments of Economic Development & Planning, Chambers of Commerce, U.S. Small Business Administration, First Peoples Fund
		14. Establish a wayfinding system	Short to Medium Term: Years 1–5	Tribal Governments, Bureau of Indian Affairs, Tribal Departments of Economic Development & Planning, SD Tourism

Goals	Strategies	Priority Initiatives	Implementation Time Horizon	Implementation Partners
2. Improve infrastructure and placemaking	2.2 Develop a range of lodging and facilities that appeal to South Dakota's main travel market segments	15. Establish network of campgrounds & RV parks, tipi glamping sites, and homestays along the Native American Scenic Byway	Short to Medium Term: Years 1–3	SD Tourism, Tribal Departments of Economic Development & Planning, Tribal Casinos, Lodging businesses
		16. Establish network of campgrounds & RV parks, tipi glamping sites, and homestays along the Oyate Trail	Short to Medium Term: Years 1–3	SD Tourism, Tribal Departments of Economic Development & Planning, Tribal Casinos, Lodging businesses
		17. Establish network of campgrounds & RV parks, tipi glamping sites, and homestays along the I-29 & Yellowstone Trail routes	Short to Medium Term: Years 1–3	SD Tourism, Tribal Departments of Economic Development & Planning, Tribal Casinos, Lodging businesses
		18. Establish artisan cooperatives and open-air markets along tourism routes	Short to Medium Term: Years 2–4	SD Tourism, SD Governor's Office of Economic Development, SD Arts Council, Tribal Departments of Economic Development & Planning, Chambers of Commerce, U.S. Small Business Administration, First Peoples Fund
	2.3 Enhance the welcoming feel of main towns and priority attractions	19. Build iconic entry points in main towns	Medium Term: Years 3–5	Tribal Governments, Bureau of Indian Affairs, SD Tourism, Tribal Departments of Economic Development & Planning, Chambers of Commerce
		20. Develop community beautification projects that create spaces that the community can be proud of	Medium Term: Years 3–5	Tribal Governments, Tribal Departments of Economic Development & Planning, Chambers of Commerce, First Peoples Fund, SD Arts Council
	2.4 Develop public-private partnerships to fund development and/or enhancements at priority attractions	21. With Tribal governments, develop feasibility plans for priority attractions, lodging options, vendor facilities, placemaking and accessibility projects	Short to Medium Term: Years 1–5	Bureau of Indian Affairs, Tribal Game, Fish & Parks/Recreation, Tribal Dept of Wildlife Resources & Management, Tribal Historic Preservation Office, Tribal Department of Revenue, Tribal Departments of Economic Development & Planning, Tribal Casinos
3. Enable tourism business success and viability	3.1 Support market readiness of Micro and Small Tourism Enterprises (MSTEs)	22. Create a Native American tourism business development and market readiness program including training in financial literacy	Short Term: Years 1–2	Tribal Colleges, Chambers of Commerce, Community Development Financial Institutions, U.S. Small Business Administration, USDA Regional Rural Development, Thunder Valley Community, Development Corporation, Lakota Youth Development, Small Business Development Center

Goals	Strategies	Priority Initiatives	Implementation Time Horizon	Implementation Partners
3. Enable tourism business success and viability	3.2 Provide affordable financing to help start and grow MSTEs	23. Advocate for and promote programs that offer affordable financing to MSTEs	Short to Medium Term: Years 2–4	Community Development Financial Institutions, Four Bands Community Fund, Lakota Funds, First Peoples Fund, U.S. Small Business Administration, USDA Rural Development, SD Governor's Office of Economic Development
4. Prepare community and skilled workforce in tourism	4.1 Build Tribal leadership and community support and buy-in for tourism	24. Develop an engagement action plan and accompanying regional level activities and events for Tribal Leaders	Short to Medium Term: Years 1–4	Great Plains Tribal Chairmen's Association
		25. Launch a tourism community awareness campaign and program in Tribal Nations	Short to Medium Term: Years 1–3	Tribal governments, Chambers of Commerce, Tribal Colleges
	4.2 Improve the quality of product and service delivery	26. Conduct a quality assurance needs assessment for accommodation and service providers	Short Term: Years 1–2	Tribal Colleges, SD Universities, Alliance of Tribal Tourism Advocates, Tribal Employment Rights Ordinance/Office
		27. Develop a strategic certification program for the existing and emerging tourism workforce, including on-the-job training opportunities through internships	Short to Medium Term: Years 2–4	Alliance of Tribal Tourism Advocates, SD Tourism, Tribal Colleges, SD Universities, Tribal Employment Rights Ordinance/ Office
		28. Provide training in digital technologies and online marketing needed to address business operation requirements in post-COVID-19 reality	Short Term: Years 1–2	SD Tourism, U.S. Small Business Administration, Chambers of Commerce, Community Development Financial Institutions, Thunder Valley Community Development Corporation, Lakota Youth Development, Small Business Development Center
5. Increase awareness of Native American tourism offerings in South Dakota among key market segments	5.1 Develop the region as a destination	29. Develop a brand architecture and strategy for Native American tourism in South Dakota	Short Term: Years 1–2	SD Tourism, SD Missouri River Tourism
		30. Establish a regional network (SDNTA) for shared responsibility of tourism management and marketing	Medium Term: Years 3–4	Tribal Governments, SD Tourism, SDNTA
		31. Train tourism businesses to promote themselves online	Short to Medium Term: Years 1–4	SD Tourism
		32. Create a Native American tourism information website, under the management of the SDNTA	Short Term: Years 1–2	Web developer
	5.2 Develop strategic partnerships to foster a greater understanding of Native American communities and promotion of Native American tourism	33. Create Familiarization Tours for tour operators, tourism service providers, gas stations, and visitor center personnel	Short to Medium Term: Years 1–4	SD Tourism, Alliance of Tribal Tourism Advocates, Convention and visitor bureaus, SD Missouri River Tourism, visitor centers, tour operators

Goals	Strategies	Priority Initiatives	Implementation Time Horizon	Implementation Partners
5. Increase awareness of Native American tourism offerings in South Dakota among key market segments	5.2 Develop strategic partnerships to foster a greater understanding of Native American communities and promotion of Native American tourism	34. Prepare Native American tourism business and attraction managers to attend trade shows and establish industry networks	Medium Term: Years 3–5	SD Tourism, SD Missouri River Tourism, Pine Ridge Area Chamber of Commerce, Red Cloud Indian School Heritage Center
		35. Create cultural awareness and Native American tourism education programs for non-Native American tour operators and gateway community tourism services providers	Short to Medium Term: Years 1–4	SD Tourism, SD Missouri River Tourism
		36. Develop a central place, such as Wakpa Sica Reconciliation Center, as a regional information center and venue for events and trainings	Short to Medium Term: Years 1-5	SD Tourism, SD Governor's Office of Economic Development, Foundations, Treaty Council, Bureau of Indian Affairs
		37. Develop a regional visitor etiquette guide for visitors and tour operators	Short Term: Years 1–2	Tribal governments, Tribal Events Planning Committees, SD Missouri River Tourism, SD Tourism
	5.3 Reach diversified market segments	38. Develop a strategic action plan with SD Tourism that helps to promote Native American tourism	Short Term: Years 1–2	SD Tourism
		39. Develop and implement a marketing strategy	Medium Term: Years 3–4	SD Tourism, SDNTA
6. Manage tourism collaboratively	6.1 Establish tourism management and plan implementation mechanisms	40. Establish a functioning and sustainable regional network (the SDNTA) to share responsibility for management of tourism management and marketing	Short to Medium Term: Years 1–3	SDNTA
		41. Guide and support establishment of tourism offices in Tribal Nations	Short to Medium Term: Years 1–5	Tribal governments, Chambers of Commerce
	6.2 Attract investors and plan implementation partners	42. Promote opportunities to prospective funders, and secure buy-in of partners	Short to Medium Term: Years 1–3	U.S. Small Business Administration, USDA Regional Rural Development, SD Governor's Office of Economic Development, First Peoples Fund, Lakota Funds, Bush Foundation, Four Bands Community Fund, Native American Bank, John T. Vucurevich Foundation, Aroha Philanthropies, Northwest Area Foundation, South Dakota Municipal League, Dakota Indian Foundation, Tribal banks/credit unions
		43. Support Tribal Nations in assessing opportunities to generate and manage tourism tax revenue	Short to Medium Term: Years 1–5	Chambers of Commerce, Tribal Departments of Economic Development and Planning, Tribal Departments of Revenue, SD Tourism, SD Department of Tribal Relations

3.1 Develop Tourism Experiences and Routes

TABLE 44: Priority Actions for creating Native American tourism routes

STRATEGY	PRIORITY ACTIONS
1.1 Develop authentic and differentiated Native American products and experiences that connect Tribal Nations along existing tourism routes.	1.1.1 Develop themed Native American experiences that are differentiated yet complementary across Tribal Nations that are located along one new and three existing tourism routes: the Native American Scenic Byway, Oyate Trail, Yellowstone Trail, and Interstate 29 1.1.2 Develop a summer Native American Events tourism route across all nine Tribal Nations

There are four existing tourism routes that are best-positioned to guide visitors from major tourism hubs to multiple Tribal Nation destinations: one is well established (the Native American Scenic Byway), two are dormant (the Oyate and Yellowstone Trails), and one is a commonly used interstate (I-29). These routes have been identified as the main areas around which to enhance existing and develop new Native American tourism anchor attractions. Figure 25 shows these tourism routes. With a range of nature- and culture-based attractions, each tourism route will offer distinct yet complementary experiences that will cater to priority markets. Creating a wide range of tourism experiences along these existing routes that appeal to different market segments will ensure a healthy mix of visitors.

Additionally, a Native American Events summer circuit will be developed to promote annual wacipis, fairs, rodeos and other appropriate events across all nine Tribal Nations. This approach also ensures that tourism benefits are distributed equitably throughout the Očhéthi Šakówiŋ.

Differentiated core tourism experiences will need to be developed along each route. The core experiences will combine attractions with well-structured activities in creative ways in order to attract specific target markets. Over time, the goal should be to create and incorporate additional, complementary offerings around the core tourism experiences. This approach will expand the economic impact of tourism to more communities on the reservations. The core experiences should be COVID-19 compliant, ensuring both visitor and resident safety, while providing an authentic and interesting experience.

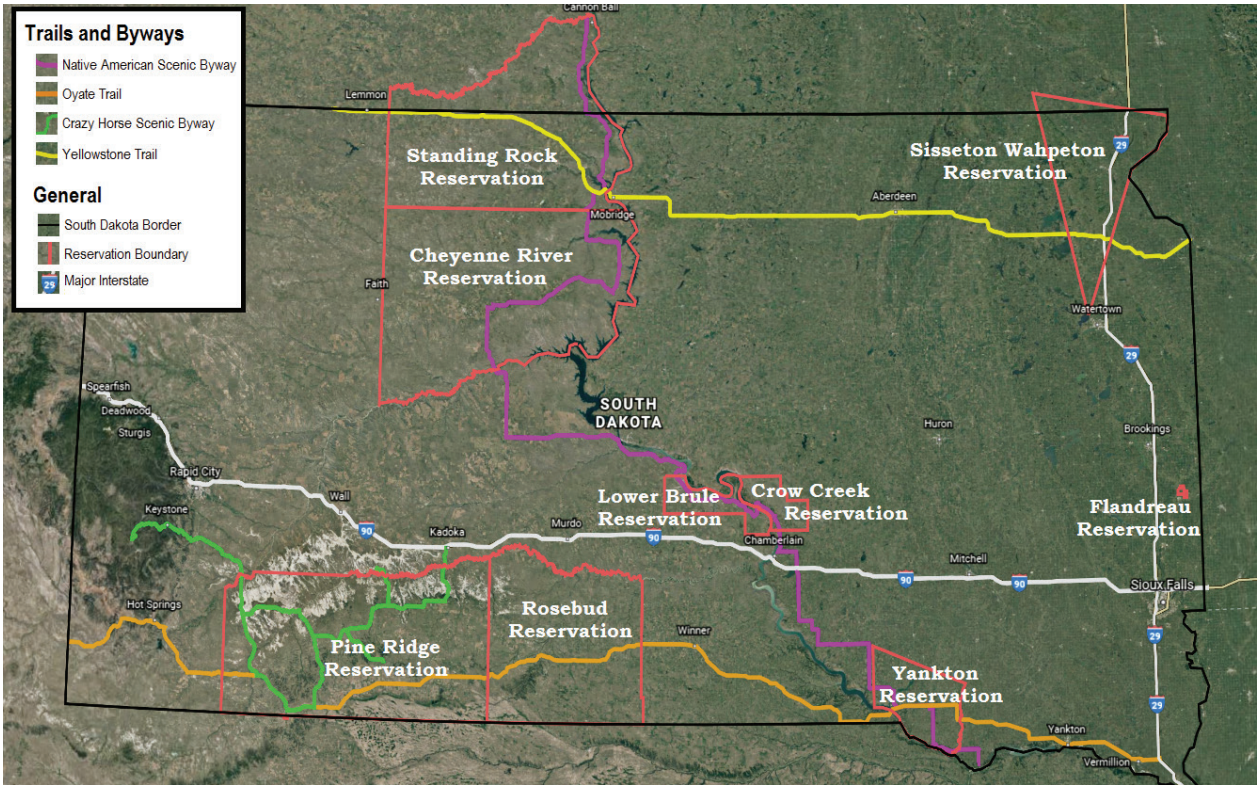


Courtesy of South Dakota Department of Toursim



Courtesy of South Dakota Department of Toursim

FIGURE 25: Map of Tourism Routes in South Dakota



Source: GW International Institute of Tourism Studies



Identifying the unique selling proposition (USP) for each tourism route is an important first step for creating differentiated core experiences. Table 45 presents the unique elements of each proposed route.

TABLE 45: Tourism routes and their unique selling propositions

ROUTE 1: Native American Scenic Byway

Route 1 is currently the most developed of the four routes. This route also travels through the most Tribal Nations—Standing Rock, Cheyenne River, Lower Brule, Crow Creek and Yankton Reservations—making it ideal for multi-day road-trippers to South Dakota. Route 1 offers a range of outdoor and nature-based activities, bound to be popular in the coming months and years because of the COVID-19 pandemic. Each of the Tribal Nations along Route 1 provides a location for outdoor recreation activities for visitors, including swimming, fishing, wildlife viewing, boating and kayaking, as well as short hikes, so there's no lack of activity for the whole family. These outdoor recreation areas include Little Moreau State Recreation Area, Lake Sharpe, Lake Francis Case, Lake Andes National Wildlife Refuge, and the Narrows Recreation Area.

Route 1 also provides an array of cultural heritage activities, offering visitors a taste of the rich culture and history of these Tribal Nations. At Standing Rock Reservation, visitors can experience the Institute of Natural History to learn about the Tribe's fossil resources, while in Cheyenne River, the Timber Lake & Area Museum interprets history of the local area and displays several impressive fossils and a complete set of traditional Lakota clothing. When visiting the Crow Creek and Lower Brule Reservations, visitors will have a chance to explore the Narrows Recreation Area and visit the Arikara earthlodge. Historically significant monuments also abound on this route, with monuments included as priority attractions in Standing Rock, Crow Creek and Yankton Reservations. Finally, Lower Brule Reservation offers one of the few existing agritourism experiences with a visit to the Lower Brule Farm Corporation, one of the world's largest growers of popcorn.

ROUTE 2: Oyate Trail

Route 2, the Oyate Trail, traverses the southernmost area of the state. This route passes through the Pine Ridge, Rosebud and Yankton Reservations. The Oyate Trail offers a unique blend of outdoor activities that provide cultural experiences for visitors; this is a great way of offering cultural learning experiences to a COVID-19-aware market. A few of these outdoor and cultural activities include the Oglala Lakota Living History Village and horseback riding near Pine Ridge Reservation. These activities are held mostly outside, but incorporate cultural lessons into the experience, immersing visitors into the historic and present cultures of the lands they're visiting. The Lakota Youth Development Tipi Stays on the Rosebud Reservation provide this same combination, with the added benefit of cultural events including star knowledge talks, cultural performances, storytelling and cultural art demonstrations.

Route 2 also offers unique outdoor experiences, with hiking trails through Badlands National Park, hikes around a number of small lakes on Rosebud Reservation, and the Lake Andes National Wildlife Refuge at Yankton Reservation. Cultural heritage sites are also abundant, with a variety of heritage centers to visit, including Oglala Lakota College Historical Center, Red Cloud Indian School Heritage Center and Sinte Gelska University Cultural Heritage Center; as well as a number of historically significant monuments at both Pine Ridge and Yankton Reservations. Finally, the Honey Lodge at Rosebud Reservation provides a unique hands-on experience making honey using traditional methods.



Courtesy of South Dakota Department of Toursim

ROUTE 3: Yellowstone Trail

The Yellowstone Trail follows Highway 12 across northern South Dakota, passing through Lake Traverse and Standing Rock Reservations. The trail also takes visitors close to the Cheyenne River Sioux Tribe, which is also included as part of this route. SWO offers visitors of this route a unique opportunity to visit the Buffalo Farm at Enemy Swim, one of only seven herds in the United States with 100% pure buffalo genes; tours are available on request and provide insight into the cultural significance of these animals.

Visitors of the Yellowstone Trail can also hike through Sica Hollow State Park, known for its enchanting autumn colors. The outdoor activities continue on the Standing Rock and Cheyenne River Reservations, with outdoor recreation areas at Little Moreau State Recreation Area, Bender Bay and The Bay at Grand River Casino. Finally, this route provides a cultural heritage program through the opportunity to view unique architecture at Agency Village, Timber Lake & Area Museum, Standing Rock Institute of Natural History, and the Standing Rock, Sitting Bull and Sacagawea Monuments.

ROUTE 4: Interstate 29 (Eastern South Dakota)

The I-29 is a major north-south highway in eastern South Dakota. This route provides an opportunity for tourists to visit both Flandreau and Lake Traverse Reservations. By venturing slightly off the route, visitors can get a quick taste of the natural and cultural heritage assets of these Tribal Nations, making this route ideal for day-trippers. Coming from the south, visitors first reach Flandreau Reservation, with an opportunity to stop at the Moody County Museum and visit the First Presbyterian Church, the oldest continuously operating church in South Dakota, established by the Santee Sioux in 1871 for cultural heritage experiences. At Palisades State Park, visitors can stretch their legs and view the ancient quartz cliff formations around Split Rock Creek from the hiking trails.

On the way to Lake Traverse Reservation, there's an opportunity to detour to the Pipestone National Monument in Minnesota, an active, culturally- and spiritually-significant site where Native Americans quarry red pipestone. On reaching the reservation, tourists have a unique chance to visit one of only seven buffalo herds in the United States with 100% pure buffalo genes. SWO also offers hiking in Sica Hollow State Park, known for its beautiful autumn colors, and unique architecture in Agency Village.

Table 46 presents the main themes for the development of differentiated tourism experiences that are based on the USP of each proposed route. The themes are organized in order of priority for development. Due to COVID-19, nature and outdoor recreation and agritourism experiences should be developed first, followed by cultural heritage and culture experiences, and finally events.

TABLE 46: Main themes for development of differentiated tourism experiences

NATURE & ADVENTURE



ROUTE 1: Native American Scenic Byway

Outdoor recreation: Route 1 offers an array of family-friendly outdoor recreation areas with water activities such as fishing, swimming, boating and kayaking as well as short hikes and picnicking spots.

Nature walk at Standing Rock: On a tour of the Standing Rock Reservation organized by the North Dakota Native Tourism Alliance, visitors have the opportunity to go on a nature walk with a knowledgeable guide to explore the cultural importance and Native American medicinal uses of plants and animals of the Great Plains.

Wildlife viewing: Tourists can visit Lake Andes National Wildlife Refuge to view grebes, pelicans, herons, gulls, white-tailed deer and ring-necked pheasants in the lake and its surrounding grasslands.



ROUTE 2: Oyate Trail

Hiking: Route 2 includes Badlands National Park, with a number of trails starting at Ben Reifel Visitor Center and winding through the dramatic landscape. Additionally, visitors can hike around the small lakes at Rosebud Reservation.

Outdoor cultural experiences: Route 2 offers a number of unique cultural learning opportunities as part of outdoor experiences, including the Oglala Lakota Living History Village, horseback riding, and the Lakota Youth Development Tipi Stays.

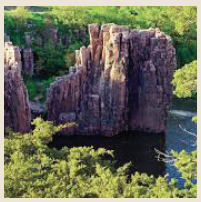
Wildlife viewing: Tourists can visit Lake Andes National Wildlife Refuge to view grebes, pelicans, herons, gulls, white-tailed deer and ring-necked pheasants in the lake and its surrounding grasslands.



ROUTE 3: Yellowstone Trail

Outdoor recreation: Route 3 offers an array of family-friendly outdoor recreation areas with water activities such as fishing, swimming, boating and kayaking as well as short hikes and picnicking spots.

Hiking: Route 3 takes visitors through Lake Traverse Reservation, where they can spend time hiking in Sica Hollow State Park—known for expansive trails and beautiful autumn colors.



ROUTE 4: : Interstate 29

Hiking: Route 4 takes visitors through Lake Traverse Reservation, where they can spend time hiking in Sica Hollow State Park—known for expansive trails and beautiful autumn colors. Travelers can also visit the Split Rock Creek Quartz Cliffs at Palisades State Park to view ancient quartzite formations from the hiking trails.

AGRITOURISM



ROUTE 1: Native American Scenic Byway

Lower Brule Farm Corporation: One of the world's largest growers of popcorn, this farm also grows beans, soybeans, corn and other farm products. All crops are grown on tribal lands and the manufacturing is performed by Tribal members.



ROUTE 2: Oyate Trail

Lakota Youth Development Honey Lodge: This organization uses traditional methods of harvesting honey. Tours provide visitors with a hands-on experience making honey during their visit.



ROUTE 3: Yellowstone Trail

Buffalo Farm at Enemy Swim: Since 2009, the SWO manages one of only seven herds in the United States with 100% pure buffalo genes. Tours are available on request and provide an insight of the cultural and historical significance of these animals to the Tribes in the area.



ROUTE 4: : Interstate 29

SWO Buffalo Farm: R: Since 2009, the SWO manages one of only seven herds in the United States with 100% pure buffalo genes. Tours are available on request and provide insight into the cultural and historical significance of these animals to the Tribal Nations.

CULTURAL HERITAGE



ROUTE 1: Native American Scenic Byway

Museums: Route 1 offers two unique and interesting museums for visitors—Standing Rock Institute of Natural History, providing education on the fossil resources of the Standing Rock Reservation and the relationship between Native Americans and fossils; and Timber Lake & Area Museum, which features an art exhibit telling the history of the prairie, and a complete set of traditional Lakota clothing.

Historic Monuments: Visitors can see a number of monuments established to honor significant characters or moments in history, including the Standing Rock Monument, Sitting Bull Monument, Sacagawea Monument, Spirit of the Circle Monument, Fort Thompson Mounds, Yankton Sioux Treaty Monument and the burial site of Phadáni Aphápi (Struck by the Ree).



ROUTE 2: Oyate Trail

Heritage Centers: The Oyate Trail offers two unique heritage centers to give visitors an understanding of the culture and history of the local Tribal Nations: the Oglala Lakota College Historical Center and Sinte Gleska University Cultural Heritage Center.

Monuments: Visitors have a chance to visit two monuments at Yankton Reservation, established to honor the Yankton Sioux Treaty and Yankton Chief Phadáni Aphápi (Struck by the Ree).

CULTURAL HERITAGE



ROUTE 3: Yellowstone Trail

Architecture: Route 3 travels through Agency Village, home to a number of unique buildings, including the Sisseton Wahpeton Administrative Building which is tipi-inspired; the Tiospa Zina Tribal School building, shaped like an eagle; and Sisseton Wahpeton College, with a building in the shape of four drummers.

Historic Monuments: Visitors can see a number of monuments established to honor significant characters or moments in history, including the Standing Rock Monument, Sitting Bull Monument, Sacagawea Monument, Spirit of the Circle Monument, and the Fort Thompson Mounds.



ROUTE 4: Interstate 29

Architecture: Route 4 travels through Agency Village, home to a number of unique buildings, including the Sisseton Wahpeton Administrative building which is tipi-inspired; the Tiospa Zina Tribal School building shaped like an eagle; and Sisseton Wahpeton College, with a building in the shape of four drummers.

Museum: The Moody County Museum at Flandreau promotes a greater understanding of the history and heritage of the region, including Native American culture and influence.

Historic building: Visitors can view the oldest continuously operating church in the state: First Presbyterian Church, also known as the resting place of Chief Taoyateduta/Little Crow, leader of the Mdewakanton Dakota in the 1850s and U.S.-Dakota War of 1862.

LIVING CULTURE



ROUTE 1: Native American Scenic Byway

Native Culinary Experience: Ubetcha Wateca is a Native American-owned restaurant specializing in Native American food products. Much of the food is locally grown and prepared, providing a great immersion into the local food culture.

Art Murals: Travelers through Route 1 can view the life-size murals by Native American artist Oscar Howe, housed at the Mobridge City Auditorium.



ROUTE 2: Oyate Trail

Art Museum: The Red Cloud Indian School Heritage Center houses a fine arts gallery with Lakota and other Native American art exhibits, as well as goods made by Native American artisans for purchase.

Cultural Immersion: The Oglala Lakota Living History Village at Pine Ridge Reservation offers an immersive experience of Oglala Lakota culture, as well as sharing Indigenous knowledge of Lakota country, while taking in beautiful landscapes.

Tipi Stay: The Lakota Youth Development Tipi Stay provides an outdoor experiential stay with cultural events including star knowledge talks, cultural performances, ancient storytelling and cultural art demonstrations.

ROUTE 4: Interstate 29

Language Classes: For visitors interested in diving deeper into the local culture, the Wakpa Ipaksan Dakota Language Program at the Wicoicaga Otipi Community Center on Flandreau Reservation offers language classes.

SUMMER EVENTS



ROUTE 1: Native American Scenic Byway

Annual wacipis (powwows) celebrating each Tribal Nation including: Rock Creek Powwow (Standing Rock), Cheyenne River Sioux Tribe Fair, Rodeo & Powwow, Crow Creek Dakota Nation Wacipi, Kul-Wicasa Oyate Fair & Rodeo (Lower Brule) and the Yankton Powwow.

Cheyenne River also hosts the E.B. Hometown Days with Arts in the Park, an annual event with community activities, art exhibits, competitions, and a range of family-friendly events.

Pro Indian Relay: Championship races are held every year with teams from Tribes throughout the Great Plains. Indian Relay goes back hundreds of years and the Plains Tribes have their own version.

Annual American Indian Days Powwow held in Fort Randall, SD (near Yankton Reservation).



ROUTE 2: Oyate Trail

Annual wacipis (powwows) celebrating each Tribal Nation, including the Oglala Lakota Nation Wacipi Rodeo Fair, Pine Ridge Generation Indigenous Days, Rosebud Annual Fair & Wacipi, and Fort Randall Casino Powwow in Yankton.

Annual American Indian Days PowWow held in Fort Randall SD (Near Yankton Reservation)

Art Shows: Native POP is a juried Native American art show and cultural celebration held annually in downtown Rapid City. Features original artwork for sale by established and emerging Great Plains Native American artists and a full day of cultural performances.

Red Cloud Indian School Heritage Center Annual Art Show on Pine Ridge Reservation. A ten-week long annual summer art show and cultural event. All artwork is for sale, with the proceeds supporting the artists and The Heritage Center.



ROUTE 3 & 4: Yellowstone Trail & Interstate 29

Annual Wacipis celebrating each Tribal Nation, including the Flandreau Santee Sioux Tribe Wacipi, Sisseton Wahpeton Oyate Wacipi, and the Rock Creek (Standing Rock) Powwow

Tables 47–51 present the recommended core Native American tourism experiences to be developed along each tourism route. The proposed experiences feature anchor attractions across multiple product development themes on and off reservations. Each priority initiative includes a recommended implementation timeline and partners, associated Tribal Nations, anchor attractions, priority activities and target market segments to be considered.

TABLE 47: Action Plan for the Native American Scenic Byway

1. PRIORITY INITIATIVE

TIMELINE
Short to Medium Term: Years 1–4

Route 1: Development of Themed Tourism Experiences along the Native American Scenic Byway

PARTNERS

Bureau of Indian Affairs, SD Tourism, Tribal governments, SD Missouri River Tourism, tourism businesses

PRODUCT CATEGORIES

Nature & Outdoor Recreation; Cultural Heritage; Agritourism

TRIBAL NATIONS

Standing Rock, Cheyenne River, Crow Creek, Lower Brule & Yankton Reservations

DESCRIPTION

The Native American Scenic Byway is an existing trail giving visitors access to five Tribal Nations. This route offers a diverse range of outdoor and nature activities, as well as giving visitors a taste of the rich cultural background of these Tribes. Visitors of the Native American Scenic Byway will enjoy outdoor attractions like the Little Moreau State Recreation Area, Lake Sharpe, Lake Francis Case, Lake Andes National Wildlife Refuge, and the Narrows Recreation Area. Culturally, the trail offers sightseeing at a number of historic monuments, as well as the Arikara earthlodge at the Narrows Recreation Area, and the Standing Rock Institute of Natural History.

ATTRACTIONS

Standing Rock Institute of Natural History, Standing Rock Monument, Sitting Bull and Sacagawea Monuments, Little Moreau State Recreation Area, Timber Lake & Area Museum and Gift Shop, Lake Sharpe, Lake Francis Case, Lower Brule Farm Corporation, Narrows Recreation Area, Oscar Howe Murals at the Mobridge City Auditorium, Lake Andes National Wildlife Refuge, Yankton Sioux Treaty Monument, and burial site of Phadáni Aphápi (aka Struck by the Ree)

ACTIVITIES

Fishing and swimming at Lakes Sharpe and Francis Case; learning the history of the local area and the relationship between Native Americans and fossils at the Standing Rock Institute of Natural History; visiting historic monuments to better understand the stories of some of the Tribal Nations along the route; light hiking and a cultural experience at the Arikara earthlodge in the Narrows Recreation Area; touring a Native American food and popcorn company; visiting the life-size Oscar Howe Murals at the Mobridge City Auditorium

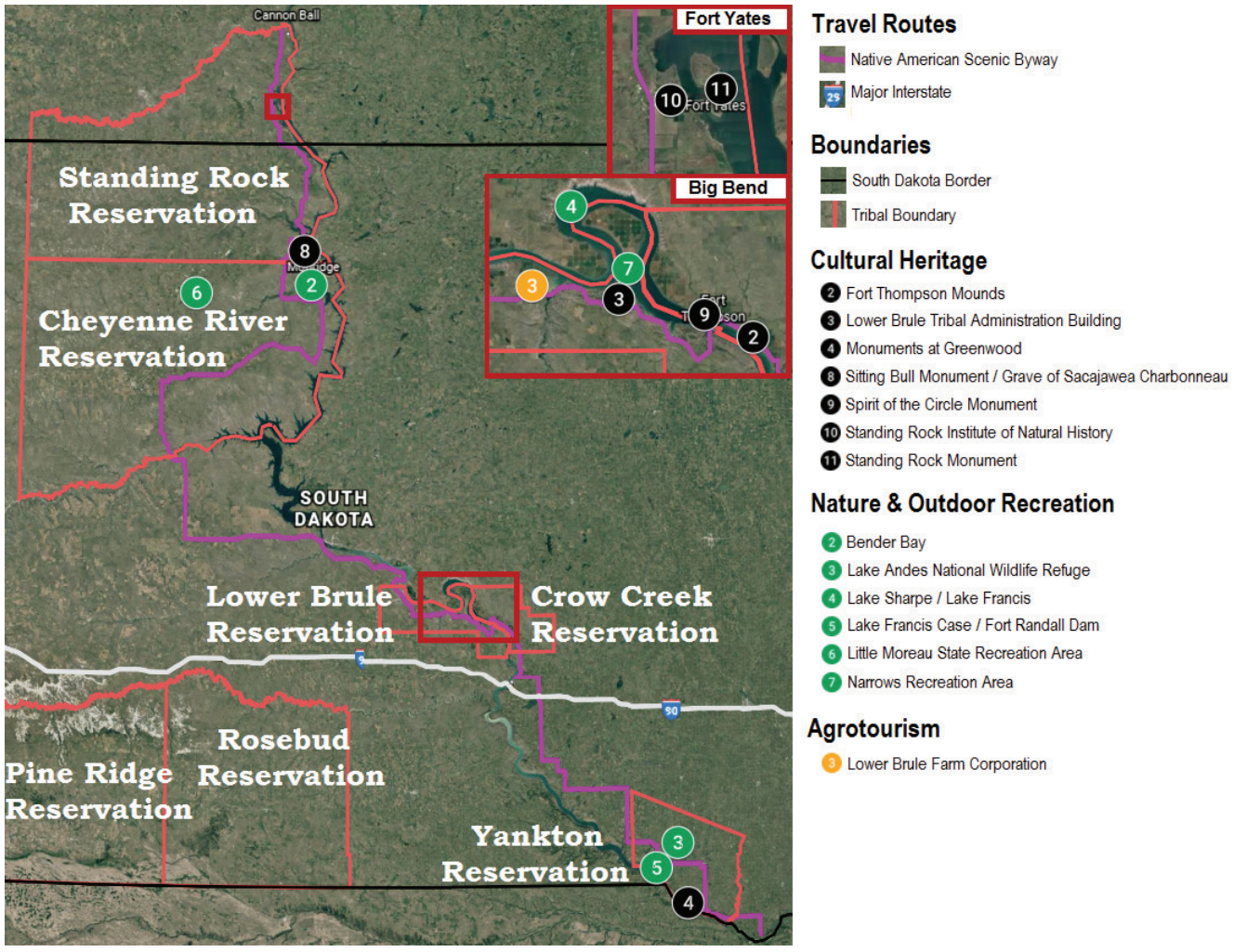
MARKET SEGMENTS

Driving market, day-trippers



Courtesy of South Dakota Department of Toursim

FIGURE 26: Map of Priority Attractions Along the Native American Tourism Byway



Source: GW International Institute of Tourism Studies

TABLE 48: Action Plan for the Oyate Trail

2. PRIORITY INITIATIVE

TIMELINE
Short to Medium Term: Years 1–4

Route 2: Development of Themed Experiences along the Oyate Trail

PARTNERS

Bureau of Indian Affairs, SD Tourism, Tribal governments, SD Missouri River Tourism, tourism businesses

PRODUCT CATEGORIES

Cultural Heritage; Nature & Outdoor Recreation; Agritourism

TRIBAL NATIONS

Pine Ridge, Rosebud & Yankton Reservations

DESCRIPTION

The Oyate Trail provides visitors a variety of experiences across three Tribal Nations: the Oglala Sioux Tribe, Rosebud Sioux Tribe, and Yankton Sioux Tribe. The trail offers an opportunity for visitors to immerse themselves in the Očhéthi Šakówiŋ culture by visiting the Oglala Lakota Living History Village as well as a number of Heritage Centers and historic monuments. Visitors can also enjoy outdoor activities, including hiking through Badlands National Park and in the Rosebud Lakes area, and visiting Lake Andes National Wildlife Refuge. The Honey Lodge at Rosebud Reservation will provide visitors with a hands-on agritourism experience of Native American honey cultivation. Finally, visitors will have a unique opportunity to stay in traditional tipis while experiencing cultural art demonstrations, performances, and storytelling.

ATTRACTIONS

Oglala Lakota Living History Village (I-90), Badlands National Park, Oglala Lakota College Historical Center, Red Cloud Indian School Heritage Center, hiking through Rosebud Lakes, Honey Lodge at Rosebud Reservation, Sinte Gleska University Cultural Heritage Center, Lakota Youth Development Tipi Stay, Lake Francis Case and Fort Randall Dam, Lake Andes National Wildlife Refuge, Yankton Sioux Treaty Monument, burial site of Phadáni Aphápi (aka Struck by the Ree)

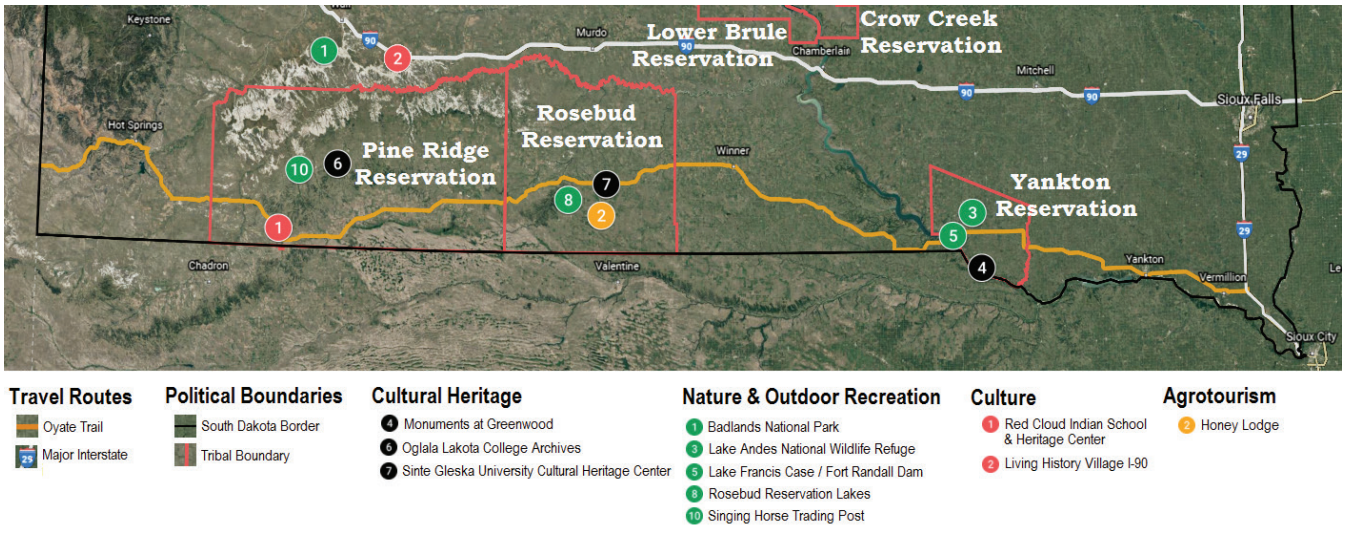
ACTIVITIES

Traditional life experience at the Oglala Lakota Living History Village; hiking trails through Badlands National Park and the Rosebud Lakes; horseback riding through the Black Hills while learning the local history; cultural learning experiences at historical centers in both Pine Ridge and Rosebud Reservations; traditional Tipi Stay with cultural experiences and teachings; hands-on experience making honey; visiting historic monuments at Yankton Reservation

MARKET SEGMENTS

Day-trippers, driving market, week stays

FIGURE 27: Map of Priority Attractions Along the Oyate Trail



Source: GW International Institute of Tourism Studies

TABLE 49: Action Plan for the Yellowstone Trail

3. PRIORITY INITIATIVE

TIMELINE
Short to Medium Term: Years 1–4

Route 3: Development of Themed Experiences along the Yellowstone Trail

PARTNERS

Bureau of Indian Affairs, SD Tourism, Tribal governments, SD Missouri River Tourism, tourism businesses

PRODUCT CATEGORIES

Nature & Outdoor Recreation; Cultural Heritage; Agritourism

TRIBAL NATIONS

Lake Traverse, Standing Rock & Cheyenne River Reservations

DESCRIPTION

The Yellowstone Trail offers a sample of South Dakota's natural and outdoor experiences, while providing a glimpse into the cultural offerings of the Tribal Nations along this route. Visitors will participate in hiking at Sica Hollow State Park, which is particularly beautiful in the fall months. Tourists can also learn about the historical significance of buffalo to the Tribal Nations by visiting the SWO Buffalo Farm at Enemy Swim, one of only seven herds in the U.S. with 100% pure buffalo genes. The trail then continues to Standing Rock and Cheyenne River Reservations, providing opportunities to visit the historic Standing Rock, Sitting Bull and Sacagawea Monuments and to enjoy the Standing Rock Institute of Natural History. Finally, visitors can participate in outdoor recreational activities at Little Moreau State Recreation Area and Timber Lake & Area in Cheyenne River Reservation.

ATTRACTIONS

Sica Hollow State Park, SWO Buffalo Farm at Enemy Swim, viewing the architecture of Agency Village, Nicollet Tower & Interpretive Center, Standing Rock Institute of Natural History, Standing Rock Monument, Sitting Bull and Sacagawea Monuments, Little Moreau State Recreation Area, Timber Lake & Area Museum and Gift Shop

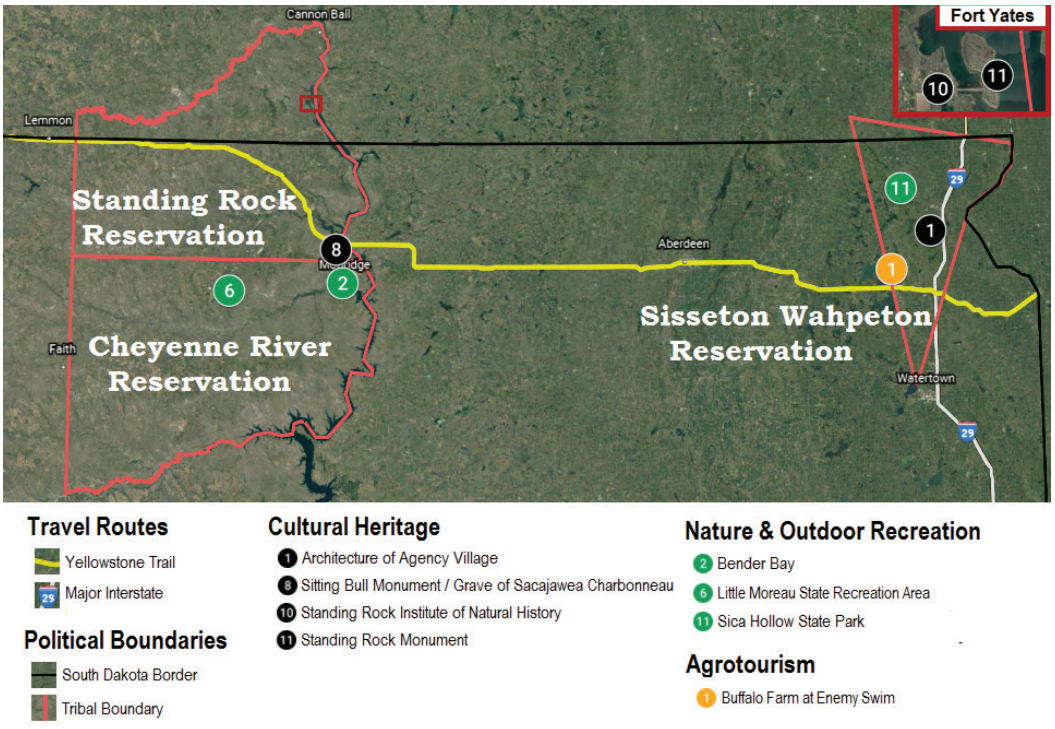
ACTIVITIES

Hiking at Sica Hollow State Park; visiting the SWO Buffalo Farm; immersing in the local cultures through visiting the Institute of Natural History and the historic Standing Rock, Sitting Bull and Sacagawea Monuments; participating in outdoor activities at Little Moreau State Recreation Area and Timber Lake Area

MARKET SEGMENTS

Day-trippers, driving market, week stays

FIGURE 28: Map of Yellowstone Trail



Source: GW International Institute of Tourism Studies



Courtesy of South Dakota Department of Toursim

TABLE 50: Action Plan for the I-29 Tourism Route

4. PRIORITY INITIATIVE

TIMELINE
Short to Medium Term: Years 1–4

Route 4: Development of Themed Experiences along Interstate 29

PARTNERS

Bureau of Indian Affairs, SD Tourism, Tribal governments, SD Missouri River Tourism, tourism businesses

PRODUCT CATEGORIES

Nature & Outdoor Recreation; Agritourism; Cultural Heritage

TRIBAL NATIONS

Lake Traverse and Flandreau Reservations

DESCRIPTION

The I-29 tourism route has a strong focus on nature and outdoor recreation activities, including hiking through Sica Hollow State Park, Falls Park, and an easy hike to view Split Rock Creek Quartz Cliffs. The trail also provides visitors with an agritourism experience through a visit to the SWO Buffalo Farm, where they can learn about the historical significance of buffalo to the Tribal Nations. The trail provides a glimpse into the culture of the Tribal Nations in the area, via the architecture in Agency Village and Nicollet Tower in Sisseton, and the Moody County Museum and First Presbyterian Church at Flandreau. Visitors can also veer a little off the path to discover Pipestone National Monument, an active red pipestone quarry and a culturally and spiritually significant site for Native Americans.

ATTRACTIONS

Sica Hollow State Park, SWO Buffalo Farm at Enemy Swim, the architecture of Agency Village, Nicollet Tower & Interpretive Center, Split Rock Creek Quartz Cliffs, Moody County Museum, First Presbyterian Church, Good Earth State Park at Blood Run, Falls Park, Pipestone National Monument

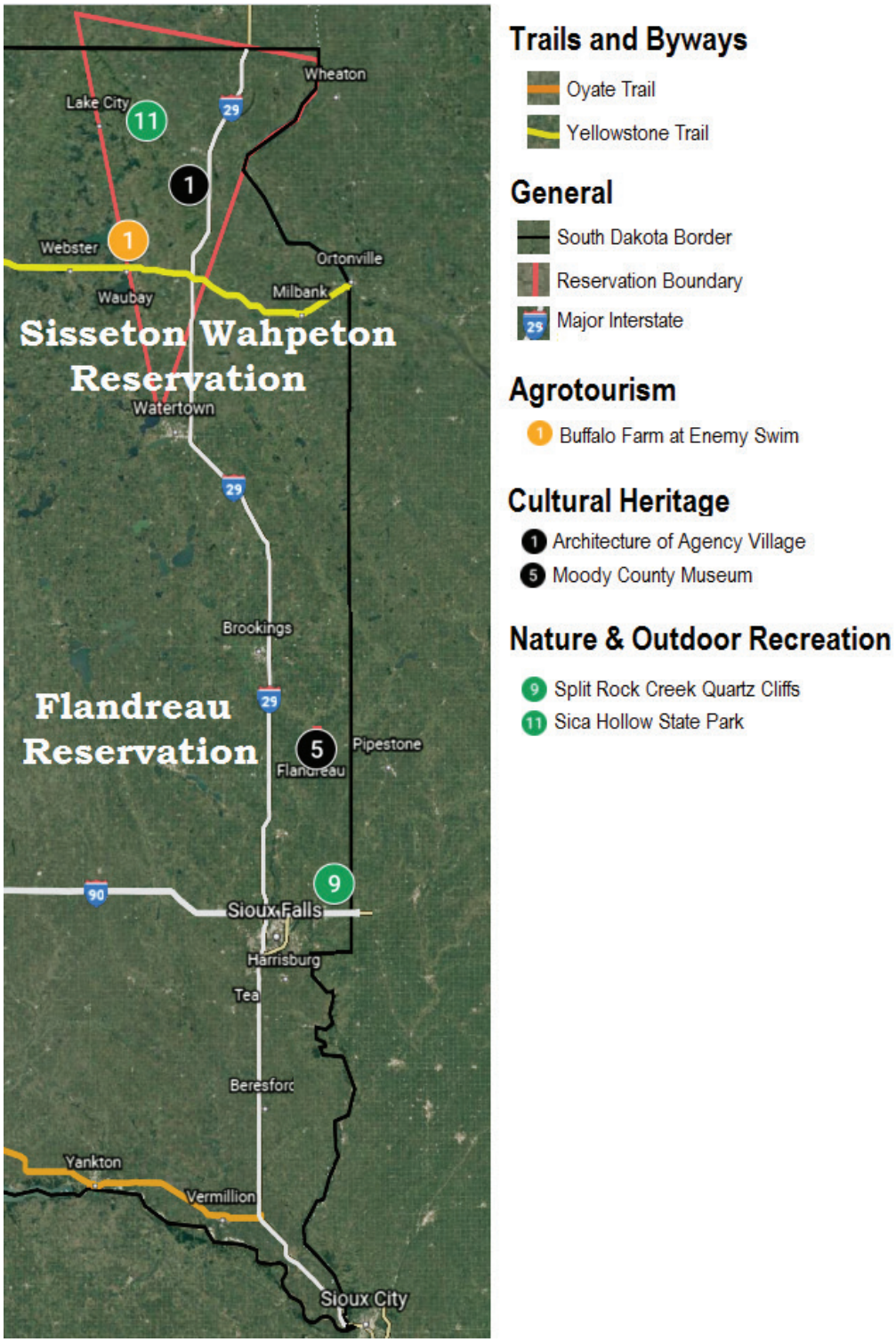
ACTIVITIES

Hiking in state parks in eastern South Dakota; visiting a historic Buffalo herd; viewing unique architecture at Agency Village; learning about local cultures and history at the Moody County Museum; visiting the culturally and spiritually significant site of Pipestone National Monument

MARKET SEGMENTS

Day-trippers, driving market, week stays

FIGURE 28: Map of I-29 Route



Source: GW International Institute of Tourism Studies

TABLE 51: Action Plan for a summer Native American Events Circuit

5. PRIORITY INITIATIVE

TIMELINE
Short to Medium Term: Years 2–4

Develop a summer Native American Events tourism circuit across all nine Tribal Nations

PARTNERS

Bureau of Indian Affairs, SD Tourism, Tribal governments, SD Missouri River Tourism, tourism businesses

PRODUCT CATEGORIES

Events

TRIBAL NATIONS

All

DESCRIPTION

In the summer months (July and August), Tribal Nations host a range of cultural and recreational events including wacipis, fairs, rodeos, memorial rides, and sporting events. Popular with the Visiting Friends and Relatives (VFR) market, many of these events are open to the general public and an engaging way for Native American and non-Native American visitors to celebrate the culture and history of each Tribal Nation. The South Dakota Department of Tribal Relations lists over 50 wacipis in communities across the Očhéthi Šakówiŋ.

Prior to COVID-19, these major events were the biggest tourism draw for visitors to reservations. Since the pandemic arrived in South Dakota the vast majority of these events have been postponed indefinitely, and Tribal Nations are not allowing nonresidents to come onto reservation land. Once new regulations are in place, travel restrictions are lifted, and large events can resume, these summer events can become anchor experiences for visitors to start their tour or other activities in Tribal Nations.

PRIORITY EVENTS

Events involving all Tribal Nations:

- Pro Indian Relay – Indian Relay goes back hundreds of years and the Plains Tribes have their own version. Championship races are held every year with teams from Tribes throughout the Great Plains.
- Native POP – A juried Native art show and cultural celebration event held annually in downtown Rapid City. Features original artwork for sale by established and emerging Great Plains Native artists and a full day of cultural performances.
- Annual American Indian Days Powwow

Tribal Nation Priority Events

- Cheyenne River Sioux Tribe Fair, Rodeo & Powwow
- Cheyenne River E.B. Hometown Days with Arts in the Park
- Crow Creek Dakota Nation Wacipi
- Flandreau Santee Sioux Tribe Wacipi
- Kul Wicasa Oyate Wacipi, Fair & Rodeo (Lower Brule)
- Oglala Lakota Nation Wacipi, Fair & Rodeo
- Pine Ridge Generation Indigenous Days
- Red Cloud Indian School Heritage Center Annual Art Show on Pine Ridge Reservation
- Rosebud Annual Fair & Wacipi
- Rock Creek Powwow (Standing Rock)
- Sisseton Wahpeton Oyate Wacipi
- Sisseton Wahpeton Harvest Fair
- Yankton Sioux Tribe Powwow

ACTIVITIES

Traditionally these events include a fair, wacipi (with grand entry), rodeo, derbies, horse races, children's activities, dance competitions, arts & crafts exhibits, sport tournaments, games and more

MARKET SEGMENTS

Visiting Friends and Relatives (VFR), day-trippers, driving market, week stays

3.2 Build Capacity for Tourism Experience Development

TABLE 52: Priority actions for developing Native American tourism experiences

STRATEGY	PRIORITY ACTIONS
1.2 Develop Native American tourism experiences that meet current (COVID-19) realities and future market demands	1.2.1 Train Native American entrepreneurs to develop experience ideas into virtual and in-destination tours 1.2.2 Develop and implement community and visitor COVID-19 safety and security preparation program 1.2.3 Create a network of certified Native American tour guides across all nine Tribal Nations

3.2.1 Provide Tourism Experience Development Support

Community participation is essential to the creation of authentic tourism experiences and appropriate management of tourism to benefit Tribal Nations. Communities should be encouraged to tell their stories and create interactive community-based experiences that allow community members to engage and educate visitors about their place, people, and history.

Additionally, individuals with exceptional local knowledge and stories should be encouraged to serve as tourism ambassadors, tour guides, and even trainers of tour guides. Similar recommendations should be made for artisans, musicians, singers, performers, and storytellers. These individuals can create independent tourism activities and experiences to offer to visitors.

Tourism Experience Studios can be used to assist interested communities and entrepreneurs (such as tour guides, artisans, and storytellers) in designing and promoting unique tourism experiences that help visitors better understand and appreciate Native American history and culture in South Dakota.

The Business Development and Market Readiness initiatives outlined in Section 3.7 will provide training and technical assistance to the communities and entrepreneurs that complete the Tourism Experience Studios. This additional training will help participants learn how to start and operate a small business.

Due to the COVID-19 pandemic, virtual experiences should be developed in addition to in-destination activities. Until the spread of the novel coronavirus is better understood and contained, entrepreneurs can utilize online virtual tourism platforms such as Airbnb Virtual Experiences to provide guided tours or cultural demonstrations. These and other virtual tourism opportunities will be explored as part of the Tourism Experience Development Studios.



Courtesy of GW International Institute of Tourism Studies

TABLE 53: Action plan for Experience Development Studios

6. PRIORITY INITIATIVE

TIMELINE
Short to Medium Term: Years 1–3

Experience Development Studios

PARTNERS

SD Tourism, Chambers of Commerce, U.S. Small Business Administration, Thunder Valley Community Development Corporation, Lakota Youth Development, First Peoples Fund, Four Bands Community Fund, Dakota Indian Foundation, Small Business Development Center, Tribal Colleges

DESCRIPTION

Organize a series of Experience Development Studios to help communities and entrepreneurs develop sustainable, immersive and COVID-19-safe experiences and/or virtual tourism experiences. The studios will support detailed product development with local groups of stakeholders, and provide a foundational set of experiences to market across the nine Tribal Nations.

The studios will be designed as a series of online workshops covering key topics.

In-destination experiences:

- Market trends relevant to the specific types of tourism products being encouraged, keeping in mind COVID-19 traveler expectations (e.g., natural and outdoor recreation)
- An overview of practical financial planning tools
- Ideas for crafting a compelling story and online presence for marketing
- Opportunities for collaboration among the communities to build a more robust visitor market
- Development of sales sheets for each experience as a final product of the studios

Virtual experiences:

- Guidance for converting in-person experiences to online fee-based experiences—for example, live conversations with guests and hosts, demonstrations in real time, or a walk through a particular cultural experience
- Overview of storytelling and online engagement techniques to gauge visitor interest and draw attendance to virtual experiences
- Advice on matching online experience platforms to particular needs of each entrepreneur, as well as best practices and technical tips for each platform
- Training on pricing virtual experiences and business considerations for these unique tourism products



Courtesy of South Dakota Department of Toursim

3.2.2 Ensuring COVID-19 Safety and Security Destination Preparedness

The COVID-19 pandemic has significantly increased the concerns and fears of South Dakota residents and visitors. To be considered as a destination in the coming months, and possibly years, it will be essential for Tribal Nations to have health and safety procedures in place and to communicate these procedures clearly and consistently to both visitors and residents. This strategy includes two priority initiatives—one for COVID-19 safety and security preparation programs for communities, and one for tour operators. By providing these trainings, the Tribal Nations can ensure they are prepared to host tourists while maintaining the safety of these visitors, as well as the safety of local residents.

TABLE 54: Action plan for a community and visitor COVID-19 safety program

7. PRIORITY INITIATIVE

TIMELINE
Short Term: Years 1–2

Develop and implement a community and visitor COVID-19 safety preparation program

PARTNERS

Tribal governments, Tribal Game, Fish & Parks/Recreation departments, Tribal departments of Wildlife Resources & Management, Chambers of Commerce, Tribal Colleges

DESCRIPTION

Develop a set of safety standards for visitors across the Tribal Nations in South Dakota. The standards should be general enough for use across the nine Tribal Nations, and should be based on tourism industry best practices.

The standards should cover the following key topics:

- Reasons for and goals of the standards, including who is expected to implement them
- **Social distancing:** Ways to maintain physical distance between tourists, and between tourists and staff, to reduce the spread of the virus, including regulations for indoor activities, and guidelines for leading tours, handling face-to-face interactions, and taking payments
- **Sanitation:** Regulations to enhance sanitation of all tours and venues to ensure visitor safety, including guidelines for personal hygiene and handwashing, sanitation of frequently touched surfaces, and rigorous cleaning and sanitation methods for any locations tourists will visit
- **Screening:** Methods of preventative screening, including screening of staff before coming to work, and guidelines to minimize possible exposure and spread in any visitor destinations
- **Local health:** Ways to protect communities during this time, which will involve restricting group sizes, educating visitors on the importance of protecting locals by abiding by health regulations, and educating community members in high-traffic areas about possible risks to vulnerable groups

Develop and implement a training program for businesses, entrepreneurs, and community members of Tribal Nations to prepare community members and provide information on what's being done to improve safety measures, with particular focus on COVID-19 regulations. The training program should provide information on the following:

- Management of public spaces as tourists return to the reservations and what is being done in these spaces to ensure the safety of locals and visitors
- Health and safety protocols for tour operators and visitors, and how local residents can contribute to the safety of the area
- Responses to resident concerns about increasing tourism numbers in the vicinity and methods for voicing fears or complaints

3.2.3 Create a Network of Certified Guides in Tribal Nations

Knowledgeable, authentic tour guides are essential for the delivery of Native American tourism experiences in South Dakota. Currently, there is very little visitation by non-Native American populations, largely due to a lack of information on possible activities and etiquette while spending time in Native American communities. Tour guides, through the quality of their interactions with visitors and the knowledge they share, can make the difference between an average trip and a great one.

The job entails, among other things, knowing the subject in great detail—including facts, figures, and anything else someone may ask. Additionally, tour guides in the Tribal Nations have the unique opportunity to share Native American stories and educate people who are unfamiliar with the history and culture of the Očhéthi Šakówiŋ Oyate. Tour guides are essential to the successful implementation and management of tourism in Tribal Nations. Table 55 outlines a priority initiative to create a network of certified Native American tour guides across all nine Tribal Nations.

TABLE 55: Action plan for Native American tour guide network in South Dakota

8. PRIORITY INITIATIVE

TIMELINE
Medium Term: Years 3–4

Create a network of certified Native American tour guides across all nine Tribal Nations

PARTNERS

Alliance of Tribal Tourism Advocates, SD Missouri River Tourism, Chambers of Commerce, Tribal Colleges, SD Tourism, tour guides

DESCRIPTION

The workforce development initiative outlined in Section 3.7 of the plan will incorporate capacity-building for tour guides and site guides.

A few important elements are proposed to ensure that the capacity-building efforts are tailored to the needs of the nine Tribal Nations:

- Baseline training supplemented by Nation-specific modules for trainee tour guides, delivered by Tribal members with exceptional knowledge of local history and stories
- Integration of practical exercises for trainees, culminating in the design and delivery of a mock tour
- Field apprenticeships, in which trainees shadow more experienced tour guides for a defined period of time
- A COVID-19 component teaching trainees the health and safety protocols in place for various types of tours and how to handle visitors who refuse to abide by these rules
- Accessible content and delivery, including for individuals with lower levels of education

3.3 Improve Tourism Attractions and Wayfinding

TABLE 56: Priority actions for development of attractions

STRATEGY	PRIORITY ACTIONS
2.1 Develop new attractions and enhance existing attractions needed for themed products, experiences and events.	2.1.1 Develop new and support enhancement of existing anchor attractions along tourism routes in order to improve facilities and develop iconic experiences 2.1.2 Establish a wayfinding system focused on signage along major roads between gateway communities and Tribal Nations with particular emphasis on main attractions and sites

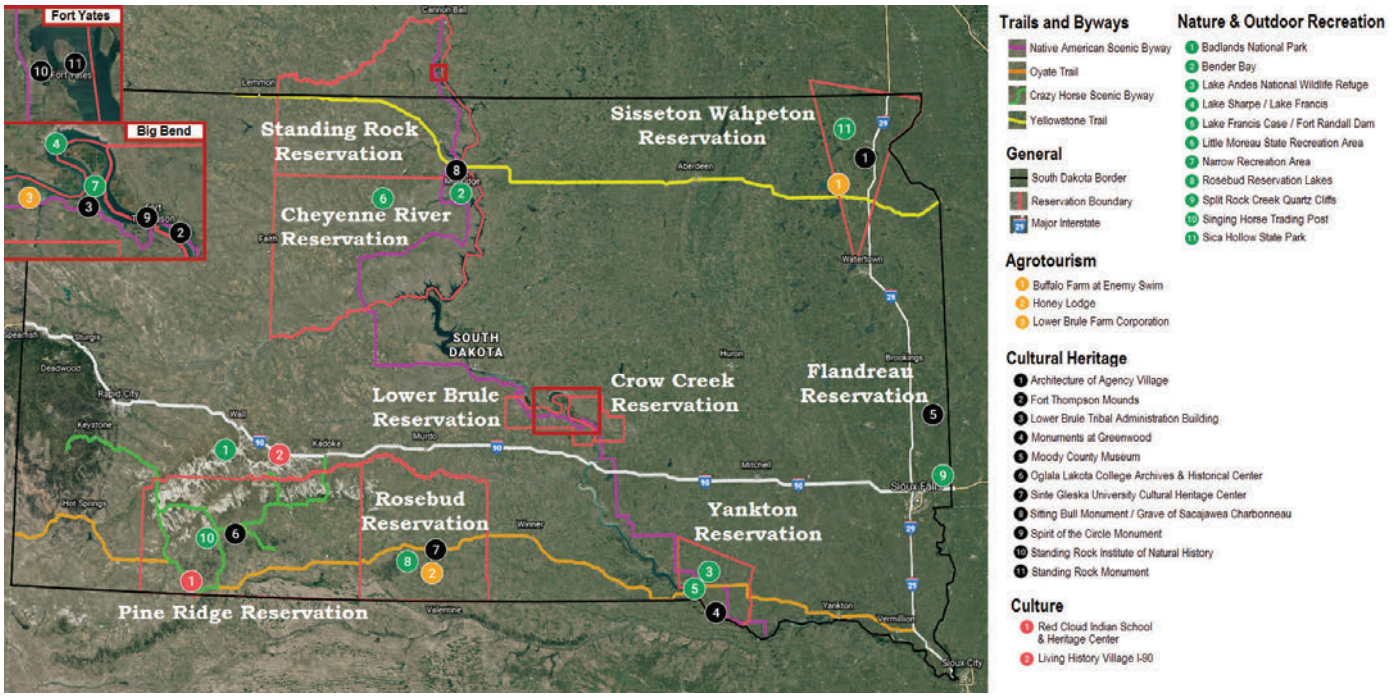
The identification and development of anchor attractions and sites—such as recreation trails, moments, historic sites and museums—along each tourism route is a critical first step for development of the differentiated, iconic experiences prioritized in Section 3.1. Figure 30 maps existing priority attractions across the nine Tribal Nations. A complete list and map of anchor and smaller attractions is included in each Tribal Nation's Companion Guide.

A comprehensive readiness assessment of 30 priority attractions found that the average rating of readiness is 73% (out of 100%). The assessment criteria are Access (for bicycles, walking, SUV/4x4, small car, bus, and operating hours), Uses (analysis of uniqueness, scenic value, passive activities, recreation, and education), Issues (level of community participation, safety/security and socio-cultural concerns, and product development), and Readiness (community interest and capacity). Each indicator was ranked on a scale of 1–5, with a score of 1 indicating the lowest/worst score and a 5 the highest/best score. Each of the four criteria were then scored based on the average ranking across their associated indicators for each attraction.

Based on this assessment the six priority attractions with the highest readiness scores across the nine Tribal Nations are:

- **The Oglala Lakota Living History Village** (culture) near Pine Ridge Reservation, accessible by the Oyate Trail and the emerging Crazy Horse Scenic Byway routes. Readiness score of 87%.
- **Sica Hollow State Park** (nature & outdoor recreation) on the Lake Traverse Reservation, accessible by the Yellowstone Trail and Interstate -29 routes. Readiness score of 86%.
- **Lake Francis Case and Fort Randall Dam** (nature & outdoor recreation) near Yankton Reservation accessible by the Oyate Trail and the Native American Scenic Byway. Readiness score of 84%.
- **Little Moreau Park/State Recreation Area** (nature and outdoor recreation) located near the Cheyenne River Reservation along the Native American Scenic Byway. Readiness score of 82%.
- **The Lower Brule Tribal Administration Building** (culture) on the Lower Brule Reservation located along the Native American Scenic Byway. Readiness score of 81%.
- **Badlands National Park** (nature and outdoor recreation) on the Pine Ridge Reservation, found along the Oyate Trail and the emerging Crazy Horse Scenic Byway. Readiness score of 80%.

FIGURE 30: Overview of existing priority Native American attractions



Source: GW International Institute of Tourism Studies

TABLE 57: : Visitor readiness scores for priority attractions along tourism routes

Attraction Name	Tribal Nation	Classification	Route	Description	Overall Readiness Score
Standing Rock Monument	Standing Rock Sioux Tribe	Cultural Heritage	Route 1 & Route 3	In the town of Fort Yates overlooking the Missouri River, Standing Rock is said to represent the petrified form of a woman and her child.	76%
Sitting Bull and Sacagawea Monuments	Standing Rock Sioux Tribe	Cultural Heritage	Route 1 & Route 3	Overlooking the Missouri River, the Monuments stand in a remote spot on SD Highway 1806, two miles southwest of Mobridge, overlooking the Missouri River. Many believe this to be the final resting place of Native American spiritual and social leader Sitting Bull.	74%
Standing Rock Institute of Natural History	Standing Rock Sioux Tribe	Cultural Heritage	Route 1 & Route 3	This museum and educational center interprets the fossil resources of the Standing Rock Sioux Reservation and the relationship between Native Americans and fossils.	76%
Bender Bay	Cheyenne River Sioux Tribe	Nature & Outdoor Recreation	Route 1 & Route 3	Recreation area with lake access, situated on the north shore of the Moreau River nine miles south of the Sitting Bull Monument.	54%
Little Moreau State Recreation Area	Cheyenne River Sioux Tribe	Nature & Outdoor Recreation	Route 1 & Route 3	Traditional winter campgrounds. During the late 1870s through 1890s, cattle barons grazed thousands of cattle on this rich grassland.	82%
Timber Lake & Area Museum and Gift Shop	Cheyenne River Sioux Tribe	Cultural Heritage	Route 1 & Route 3	The museum features the "Sea of Grass" art exhibit created by 24 Native American and non-Native American artists that tells the history of the prairie. The Warrior Collection is a complete set of traditional Lakota clothing.	72%
Narrows Recreation Area	Lower Brule Sioux Tribe	Nature & Outdoor Recreation	Route 1	The largest natural meandering river loop in the United States. It features a narrow "neck" of land formed around a chain of hills 1.5 miles wide. A Lewis & Clark historical site. Located near the Big Bend is an Arikara earthlodge.	72%
Lower Brule Wildlife Office	Lower Brule Sioux Tribe	Nature & Outdoor Recreation	Route 1	Surrounded by bison and elk range, the wildlife facility offers unique interpretive exhibits and displays of area wildlife and Native American trees, plants and grasses.	71%
Lower Brule Farm Corporation	Lower Brule Sioux Tribe	Agritourism	Route 1	Grows corn, popcorn, edible beans, soybeans, alfalfa and other farm products. The Farm is one of the world's largest growers of popcorn. All crops are grown on tribal lands, and the manufacturing is performed by Tribal members.	73%
Lower Brule Tribal Administration Building	Lower Brule Sioux Tribe	Cultural Heritage	Route 1	A state-of-the-art facility, with a beautiful Tribal Council Meeting Chamber, murals, artwork and artifact display. Buffaloes meander through the plains near the building. Gift shop with Native American gifts, clothes and goods.	81%
Lake Sharpe	Crow Creek Sioux Tribe	Nature & Outdoor Recreation	Route 1	Located on the Missouri River, the lake is ideal for boating, fishing, paddleboarding, kayaking, and diving. Campers, history buffs, mountain bikers and hikers will find new adventures in this rugged land once explored by Lewis and Clark.	71%

Attraction Name	Tribal Nation	Classification	Route	Description	Overall Readiness Score
Fort Thompson Mounds	Crow Creek Sioux Tribe	Cultural Heritage	Route 1	A series of low earthen mounds, extending from the eastern end of the Missouri River's Big Bend. Believed to be burial mounds, which in some cases overlay older cultural materials. Very little information about this site exists.	66%
Spirit of the Circle Monument	Crow Creek Sioux Tribe	Cultural Heritage	Route 1	Dedicated in 2002, the Spirit of the Circle Monument at Big Bend Dam honors the more than 1,300 people who died of malnutrition and exposure over a three-year period in the 1860s.	74%
Lake Francis Case and the Fort Randall Dam	Yankton Sioux Tribe	Nature & Outdoor Recreation	Route 1 & Route 2	A Missouri River reservoir, popular for swimming, fishing, camping and other outdoor activities. Fort Randall Dam, the large earthen dam that creates Lake Francis Case, is located at Pickstown.	84%
Lake Andes National Wildlife Refuge	Yankton Sioux Tribe	Nature & Outdoor Recreation	Route 1 & Route 2	Grebes, pelicans, herons and gulls are commonly spotted species. White-tailed deer and ring-necked pheasants inhabit the grasslands surrounding the lake.	79%
Yankton Sioux Treaty Monument	Yankton Sioux Tribe	Cultural Heritage	Route 1 & Route 2	Yankton Sioux Treaty Monument commemorates the treaty between the United States and the Yankton Sioux Tribe. The burial site of Phadáni Aphápi (Struck by the Ree) is just north of the Treaty Monument.	64%
Oglala Lakota Living History Village	Oglala Sioux Tribe	Culture	Route 2	Immersive exploration of the culture and Indigenous knowledge of the Oglala Sioux Tribe, set in a beautiful landscape.	87%
Badlands National Park	Oglala Sioux Tribe	Nature & Outdoor Recreation	Route 2	Dramatic landscapes span layered rock formations, steep canyons and towering spires. Several trails begin near the Ben Reifel Visitor Center.	80%
Singing Horse Trading Post	Oglala Sioux Tribe	Nature & Outdoor Recreation	Route 2	Horse riding along trails in the shadow of the Black Hills through prairies, canyons and grasslands, with cultural lessons incorporated.	62%
Oglala Lakota College Historical Center	Oglala Sioux Tribe	Cultural Heritage	Route 2	Welcomes visitors to a cultural center with an audio-video tour of the Oglala Sioux Tribe in the 19th century, ending with the events at Wounded Knee in December of 1890.	71%
Oglala Lakota College Historical Center	Oglala Sioux Tribe	Cultural Heritage	Route 2	Welcomes visitors to a cultural center with an audio-video tour of the Oglala Sioux Tribe in the 19th century, ending with the events at Wounded Knee in December of 1890.	71%
Red Cloud Indian School Heritage Center	Oglala Sioux Tribe	Culture	Route 2	A fine arts gallery with Native American art exhibits and a gift shop with authentic Native American-made goods.	79%
Sinte Gleska University Cultural Heritage Center	Rosebud Sioux Tribe	Cultural Heritage	Route 2	Home to the official archives of the Rosebud Sioux Tribe, as well as artifacts collected by the University. SGU was established in 1971 to create an environment of learning centered on Lakota language, culture, history and Sicangu Lakota beliefs.	73%

Attraction Name	Tribal Nation	Classification	Route	Description	Overall Readiness Score
Rosebud Reservation Lakes	Rosebud Sioux Tribe	Nature & Outdoor Recreation	Route 2	Chases Woman, Ghost Hawk, Indian Scout, and other Rosebud Lakes. Surrounded by groves of cottonwood and willow trees, small lakes accessible by hiking trails or road, some with picnic areas.	75%
Honey Lodge	Rosebud Sioux Tribe	Agritourism	Route 2	Lakota Youth Development–run honey company.	65%
Sica Hollow State Park	Sisseton Wahpeton Oyate	Nature & Outdoor Recreation	Route 3 & Route 4	Sica Hollow State Park is known for its hiking and horseback riding trails, and especially for autumn colors.	86%
SWO Buffalo Farm at Enemy Swim	Sisseton Wahpeton Oyate	Agritourism	Route 3 & Route 4	Established in 2009, this is one of seven herds in the United States with documented 100% pure buffalo genes. An integral part of activities on the Reservation and the focal point of many cultural, spiritual and educational programs as well as healthy lifestyles.	64%
Agency Village	Sisseton Wahpeton Oyate	Cultural Heritage	Route 3 & Route 4	Visit the Sisseton Wahpeton Administrative Building (tipi-inspired), Tiospa Zina Tribal School building (shape of an eagle), and Sisseton Wahpeton College (shape of four drummers	75%
Split Rock Creek Quartz Cliffs	Flandreau Santee Sioux Tribe	Nature & Outdoor Recreation	Route 4	Known for its towering quartzite cliffs, visitors can get a great look at these ancient formations from the hiking trails in Palisades State Park south of Flandreau.	69%
Moody County Museum	Flandreau Santee Sioux Tribe	Cultural Heritage	Route 4	Promotes a greater understanding of the history and heritage of the region, including the area's Native American culture and influence.	72%
First Presbyterian Church	Flandreau Santee Sioux Tribe	Cultural Heritage	Route 4	Oldest continuously operating church in the state. Associated with the earliest settlement of the Flandreau homestead colony. Includes the grave of Chief Taoyateduta/Little Crow, leader of the Mdewakanton Dakota in the 1850s and U.S.-Dakota War of 1862.	66%

Source: GW International Institute of Tourism Studies



Courtesy of GW International Institute of Tourism Studies

Development plans should be created for priority attractions, taking into consideration visitor flow, visitor experience, and better access to attractions. Key elements of the development plans will include structured pathways and signage, maps, educational interpretive materials, and visitor etiquette guidelines. Attractions should also have public restrooms. The attractions will need consistent management over time.

Due to the COVID-19 pandemic, development timelines will vary. Nature & Outdoor Recreation and Agritourism attractions will be developed in the short term (1–2 years). Implementation of Cultural Heritage, Culture, and Events will be in the medium term (3–5 years). Tables 58-63 present several priority initiatives for development of anchor attractions.

TABLE 58: Action plan for developing new and existing nature and outdoor recreation attractions

9. PRIORITY INITIATIVE

TIMELINE
Short Term: Years 1–2

Develop new and support enhancement of existing Nature & Outdoor Recreation anchor attractions

PARTNERS

SD Tourism, SD Game Fish & Parks, SD Governor's Office of Economic Development, Tribal Game, Fish & Parks/Recreation Departments, Tribal Dept of Wildlife Resources & Management, Tribal Departments of Economic Development & Planning, Chambers of Commerce, U.S. Small Business Administration, USDA Regional Rural Development

DESCRIPTION

Great nature and outdoor recreation attractions are abundant across all nine Tribal Nations in South Dakota. As demand for these types of attractions increases in the coming months due to the COVID-19 pandemic, it's important the Tribal Nations place a high priority on their development. The following nature and outdoor recreation attractions are considered high priority, and need further development as recommended:

- **Little Moreau State Recreation Area:** The key area for development is access, signage and public restroom facilities.
- **Lake Sharpe and Lake Francis Case:** This attraction has two key areas for development. Access by walking and bicycle is extremely difficult; and there are many challenges in terms of environmental fragility.
- **Narrow Recreation Area:** Two key areas for concern here are the environmental fragility of the attraction, and relatively limited community interest in and capacity for improving readiness.
- **Lake Andes National Wildlife Refuge:** The readiness score of this attraction is relatively high, however access could use improvement—the operating hours make access difficult, and there's very limited access via bicycle, walking, or bus.
- **Hiking & Riding Trails on Pine Ridge:** Access to the trails is difficult by all methods, and the trials are underdeveloped. Additionally, there is limited community interest in and capacity for improving readiness.
- **Hiking through Rosebud Lakes:** The greatest concerns for these hikes are the environmental fragility and product development needs. To improve readiness, environmental protection plans should be implemented and hiking trails clearly posted.
- **Split Rock Creek Quartz Cliffs:** Access to this attraction is limited on foot and bicycle, and operating hours are limited. Additionally, environmental fragility should be considered before this attraction can improve its readiness score.
- **Good Earth State Park at Blood Run:** Good Earth State Park currently faces limiting issues, including environmental fragility and socio-cultural concerns. Better coordination between Tribal and non-Tribal management should be implemented to address these concerns.
- **Pipestone National Monument:** Environmental fragility is a great concern for this attraction, along with socio-cultural issues and limited community participation

PRIORITY ATTRACTIONS ALREADY DISPLAYING HIGH READINESS SCORES

- Lake Francis Case and Fort Randall Dam – 84%
- Badlands National Park – 80%
- Sica Hollow State Park – 86%

GENERAL DEVELOPMENT NEEDS

Wayfinding & signage, Interpretive signs, public facilities (including restrooms)

TABLE 59: Action plan for developing new and existing agritourism attractions

10. PRIORITY INITIATIVE

TIMELINE
Short Term: Years 1–2

Develop new and support enhancement of existing Agritourism anchor attractions

PARTNERS

SD Tourism, SD Game Fish & Parks, SD Governor's Office of Economic Development, Tribal Dept of Wildlife Resources & Management, Tribal Departments of Economic Development & Planning, Chambers of Commerce, U.S. Small Business Administration, USDA Rural Development, Agriculture businesses

DESCRIPTION

Agritourism products remain a priority during the COVID-19 pandemic, as many of these attractions are largely outdoors and allow for social distancing practices. Currently, there are few agritourism attractions operating across the routes, but the existing attractions offer great experiences for visitors. The enhancement of these attractions, as well as the development of new ones, will be important in the coming months and years to provide a greater variety of experiences during COVID-19. The following agritourism attractions are considered high priority and further development is needed as recommended below:

- **Lower Brule Farm Corporation:** This attraction has a relatively high readiness score of 73%; the biggest area for improvement is in the recreational uses at this location and its scenic value. This could be improved by providing a day-use picnic area with seating on a well-kept grass area for visitors.
- **Nature Walk with Tribal plants expert at Standing Rock:** This experience is currently being developed as a part of a multiday tour experience at the Standing Rock Reservation. Specifics for trained guides, itinerary coordination, and logistics for "where and how" need to be finalized.
- **Lakota Youth Development Honey Lodge:** The Honey Lodge faces issues in terms of community participation, environmental fragility and product development needs.
- **SWO Buffalo Farm at Enemy Swim:** The greatest concerns for this attraction are its environmental fragility, product development needs, and community interest in and capacity for improving readiness.

POTENTIAL ATTRACTIONS

- International Society for the Protection of Mustangs and Burros: This attraction at the Cheyenne River Reservation has since closed. It provided not only an agritourism experience but also outdoor recreation, and it's worth considering rebuilding this attraction.

GENERAL DEVELOPMENT NEEDS

Wayfinding & signage, interpretive signs, public facilities (including restrooms)



Courtesy of Lakota Honey Lodge

TABLE 60: Action plan for developing new and existing cultural heritage attractions

11. PRIORITY INITIATIVE

TIMELINE
Medium Term: Years 3–4

Develop new and support enhancement of existing Cultural Heritage anchor attractions

PARTNERS

SD Tourism, SD Governor's Office of Economic Development, SD Arts Council, Tribe Historic Preservation Office, Tribe Departments of Economic Development & Planning, Chambers of Commerce, U.S. Small Business Administration, First Peoples Fund

DESCRIPTION

Great cultural heritage attractions are available through the nine Tribal Nations, providing visitors an insight into the history of these Nations. The enhancement and development of these attractions are recommended in the medium term, due to the trend toward outdoor activities at this time, to allow for social distancing. The following existing cultural heritage attractions are considered top priority within this category, and further development is needed as recommended below:

- **Standing Rock Institute of Natural History:** This attraction already has a good readiness score (76%), however improvements can be made in the scenic value and recreational uses. This could be achieved through providing an outdoor space for visitors to use, with attractive landscaping.
- **Standing Rock Monument:** This attraction also has a decent readiness score, however there is room for improvement in community participation and interest in this attraction, to boost the readiness score.
- **Sitting Bull and Sacagawea Monuments:** Key areas for improvement here include socio-cultural concerns and product development needs. This attraction has unique cultural significance; however, providing more information for visitors and addressing socio-cultural issues will help to improve its readiness.
- **Timber Lake & Area Museum and Gift Shop:** This attraction is already at a decent level of readiness. The greatest concerns here are its limited uses for visitor recreation, and its limited scenic value. Providing recreational spaces with landscaping is recommended.
- **Yankton Sioux Treaty Monument:** The greatest need for development here relates to the issues faced, including limited community participation, environmental fragility and product development needs.
- **Phadáni Aphápi (Struck by the Ree) Burial Site:** This site has a relatively low readiness score (56%), with issues in community participation and interest, socio-cultural concerns, environmental fragility and product development needs.
- **Oglala Lakota College Historical Center:** The readiness assessment here demonstrated a need to improve the recreational areas and scenic value of this attraction. Improvements in providing day-use areas and attractive landscaping will assist with this score.
- **Sinte Gleska University Cultural Heritage Center:** The assessment here recognizes a need to improve the scenic value and recreational use for visitors to this attraction.
- **Moody County Museum:** The area of greatest concern for this attraction is its limited uses. The uniqueness score is low, so this attraction should focus on improving its unique experiences. Additionally, improvements in recreational spaces and scenic value should be made.
- **First Presbyterian Church:** The greatest areas of concern here are limited uses and product development needs. More work needs to be put into this attraction to create an "experience" for visitors, however community interest in and capacity to build out this attraction are limited.

PRIORITY ATTRACTIONS ALREADY DISPLAYING HIGH READINESS SCORES

- Architecture of Agency Village – 80%, 79% and 65% for three buildings

GENERAL DEVELOPMENT NEEDS

Wayfinding & signage, interpretive signs, public facilities (including restrooms)

TABLE 61: Action plan for developing new and existing cultural attractions

12. PRIORITY INITIATIVE

TIMELINE
Medium Term: Years 3–4

Develop new and support enhancement of existing Living Culture anchor attractions

PARTNERS

SD Tourism, SD Governor's Office of Economic Development, SD Arts Council, Tribe Historic Preservation Office, Tribe Departments of Economic Development & Planning, Chambers of Commerce, U.S. Small Business Administration, First Peoples Fund

DESCRIPTION

Attractions that fall under the Culture category provide visitors with insights into the living cultures of these Tribal Nations through experiences such as arts, languages and storytelling. Like the cultural heritage attractions, these Culture attractions are recommended for priority in the medium term, due to the trend toward outdoor activities at this time to allow for social distancing. The following existing culture attractions are considered top priority within this category, and require further development:

- **Oscar Howe Murals at the Mobridge City Auditorium:** These murals provide a unique attraction, however there is very limited information available online, demonstrating a need for product development.
- **Red Cloud Indian School Heritage Center:** This attraction currently has a high readiness score (79%); the greatest development need is improving its scenic value and recreational space available to visitors.
- **Ubetcha Wateca restaurant:** This culinary experience is accessible to visitors, however the level of education provided is minimal. It would be interesting to provide background on the cuisine.

PRIORITY ATTRACTIONS ALREADY DISPLAYING HIGH READINESS SCORES

- Lakota Youth Development Tipi Stay – 80%
- Living History Village I-90 – 87%

GENERAL DEVELOPMENT NEEDS

Wayfinding & signage, interpretive signs, public facilities (including restrooms)



Courtesy of Red Cloud Indian School Heritage Center

TABLE 62: Action plan for developing new and existing events attractions

13. PRIORITY INITIATIVE

TIMELINE
Medium Term: Years 3–4

Develop new and support enhancement of existing anchor Events

PARTNERS

SD Tourism, SD Arts Council, Tribe Event Planning Committees, Tribe Departments of Economic Development & Planning, Chambers of Commerce, U.S. Small Business Administration, First Peoples Fund

DESCRIPTION

Hosting events is a great way to draw visitors to a destination. The nine Tribal Nations host a large number of events during the summer months, which are ideal for visitors. The enhancement and development of events—like cultural heritage and culture attractions—is a medium-term initiative due to current restrictions on gatherings caused by COVID-19. The following events are considered the highest priority for enhancement, but require further development:

- **Annual American Indian Days Powwow:** Two key issues here are the limited educational opportunities for visitors at this event and product development challenges. Information should be provided to visitors both prior to attending and at the wacipi to educate about the history and significance of the event.
- **Pro Indian Relay:** This attraction scored well against many criteria for the readiness assessment; the biggest issue is the limited access. Access by multiple avenues needs to be improved, including by car, bus, walking, and bicycle.
- **Native POP:** The readiness score for this event is relatively high (73%), however it has a need for product development, and community capacity to build readiness may be limited.
- **Cheyenne River E.B. Hometown Days with Arts in the Park:** a key area for improvement for this event is to increase the educational opportunities for visitors attending. The event should provide information on its history, and cultural significance.
- **Crow Creek Dakota Nation Wacipi:** While this event scored relatively high across all categories of the readiness assessment, there are remaining issues of socio-cultural concerns, environmental fragility and product development needs that should be addressed.
- **Oglala Lakota Nation Wacipi, Fair & Rodeo:** This event has a relatively high readiness score, however there are remaining economic concerns for the event. These should be addressed in order to improve the event's readiness score.
- **Pine Ridge Generation Indigenous Days:** This event, while interesting and unique, was one of the lower-scoring events on the readiness assessment. There are development needs across access to the event, educational benefits, scenic value, experience development, as well as social and environmental concerns.
- **Rosebud Annual Fair & Wacipi:** The Rosebud Fair & Wacipi scored a relatively high readiness score (78%), with one key issue being limited access to the event by foot or bicycle.
- **Rock Creek Powwow:** The Rock Creek Powwow is a relatively high-scoring event, however to reach a greater level of readiness, educational aspects of the event should be developed for visitors.
- **Fort Sisseton Harvest Festival:** This event was high-scoring across almost all categories in the readiness assessment, however access to the event by bus and foot should be improved to improve the experience for visitors.
- **Yankton Sioux Tribe Powwow:** The Yankton Powwow is another high-scoring event, however there is room for improvement in providing educational opportunities for visitors, and issues are still present around socio-cultural concerns and environmental fragility.

EXISTING PRIORITY EVENTS ALREADY DISPLAYING HIGH READINESS SCORES

- Cheyenne River Sioux Tribe Fair, Rodeo & Powwow – 84%
- Flandreau Santee Sioux Tribe Wacipi – 80%
- Kul Wicasa Oyate Fair & Rodeo (Lower Brule) – 85%
- Red Cloud Indian School Heritage Center Annual Art Show on Pine Ridge Reservation – 85%
- Sisseton Wahpeton Oyate Wacipi – 81%

GENERAL DEVELOPMENT NEEDS

Wayfinding & signage, interpretive signs, public facilities (including restrooms), trash and waste management, potential ticket sales

TABLE 63: Action plan for establishing a wayfinding system across all nine Tribal Nations

14. PRIORITY INITIATIVE

TIMELINE
Short to Medium Term: Years 1–5

Establish a wayfinding system across all nine Tribal Nations

PARTNERS

Bureau of Indian Affairs, Tribal Departments of Economic Development & Planning, SD Tourism

DESCRIPTION

A system of wayfinding should be established both within each Tribal Nation for key attractions, and for each of the tourism routes. These systems will need to include the following:

- **Signage:** Welcome signs, directional signs, advertising and interpretive signs are needed to guide travelers around the circuits and direct them to attractions. This will include signage along major trails in National and State Parks and other nature areas. Adequate signage gives travelers a sense of safety and confidence when moving through the destination, and can contribute to longer stays. Any road signs should be compatible with the standards in the Manual on Uniform Traffic Control Devices developed by the Federal Highway Administration.
- **Landmarks:** Landmarks can be used as anchors, reference points or communication tools to easily guide travelers through the destination or circuit.
- **Mapping:** Providing maps of key attractions within a Tribal Nation, and attractions along each circuit, will ensure visitors understand the best paths to take and top attractions to visit.

3.4 Develop a Range of Accommodations and Facilities

TABLE 64: Priority actions for developing a range of lodging and facilities that appeal to South Dakota's main travel market segments

STRATEGY	PRIORITY ACTIONS
2.2 Develop a range of lodging and facilities that appeal to South Dakota's main travel market segments	2.2.1 Establish a network of campgrounds, RV parks, tipi glamping sites, and homestays along tourism routes 2.2.2 Support establishment of artisan and local vendor cooperatives and open-air markets

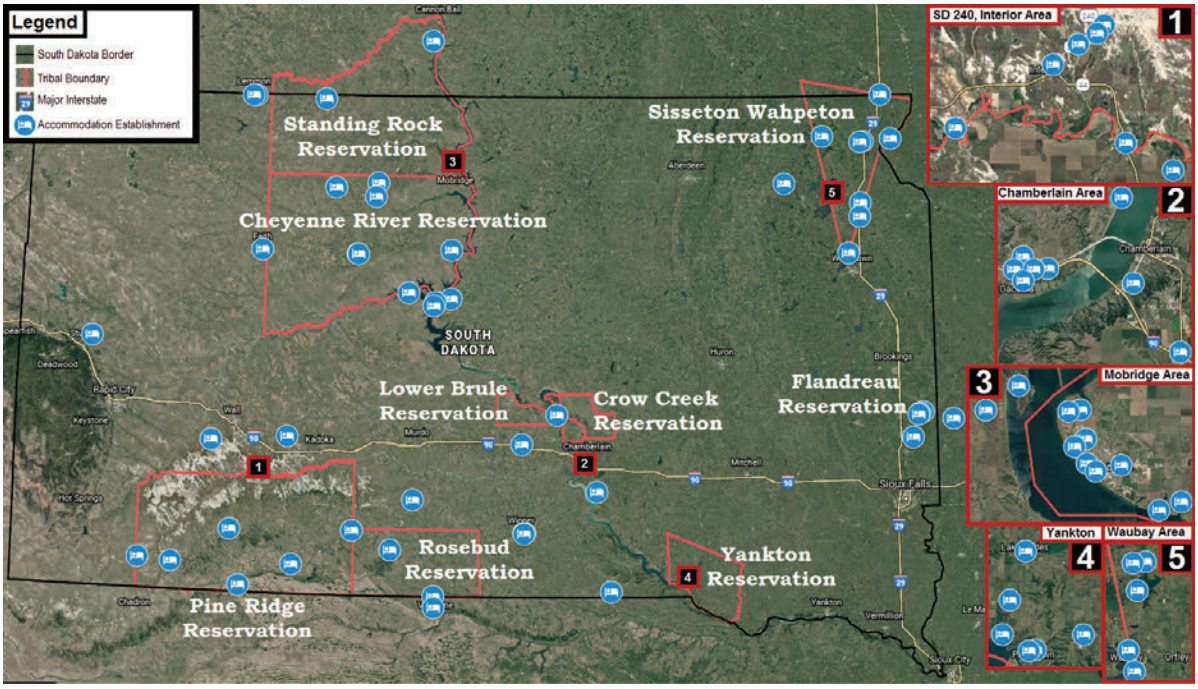
3.4.1 Lodging Facilities on and near Reservations

Having accessible and diversified lodging options is a critical priority for tourism development in Tribal Nations. There are limited hotel and motel options within reservation boundaries, with most hotel-style accommodations existing outside of reservations. Pine Ridge Reservation and Lake Traverse Reservation have the most accommodation options within 30 miles of the reservation. Casinos play an important role as the primary lodging option for most Tribal Nations. Eight of the nine Tribal Nations have casinos that include hotels.

Due to the immense investment of funds and time involved in constructing hotels and motels, SDNTA members decided the development of a network of campgrounds, RV Parks, tipi stays, and homestays along tourism routes would be the most effective way to increase affordable lodging options for visitors.

Having clean, affordable and safe accommodations near priority attractions along tourism routes is essential to the success of the Native American tourism experiences presented in Section 3.2. Tables 65–67 outline the 2025 aspirations for lodging development networks along tourism routes.

FIGURE 31: Priority Accommodations On or Near Reservations



Source: GW International Institute of Tourism Studies

TABLE 65: Action plan for establishing accommodation options for Route 1: Native American Scenic Byway

15. PRIORITY INITIATIVE

TIMELINE
Short to Medium Term: Years 1–3

Establish network of campgrounds, RV parks, tipi glamping sites and homestays for Route 1: Native American Scenic Byway

PARTNERS

SD Tourism, Tribal Departments of Economic Development & Planning, Tribal Casinos, lodging businesses

TRIBAL NATIONS

Standing Rock, Cheyenne River, Crow Creek, Lower Brule & Yankton Reservations

DESCRIPTION

The network will aim to provide authentic experiences in the types of accommodations that are growing in popularity during the COVID-19 pandemic. The network will stretch along the Native American Scenic Byway and through the Standing Rock, Cheyenne River, Crow Creek, Lower Brule, and Yankton Reservations.

The priority accommodation sites to revamp and market along this trail include:

- The Bay at Grand River Casino (3.5/5 rating)
- Left Trailrace Campground (4.6/5 rating)
- Randall Creek Recreation Area (4.7/5 rating)
- Little Bend RV Park (3.7/5 rating)

These existing accommodation sites demonstrate the range of priority accommodation types available on this route, including both campgrounds and RV parks. While two of these (Left Trailrace Campground and Randall Creek Recreation Area) have high ratings (above 4.5 out of 5), the remaining two are scored relatively low. It's important to review the ratings for these sites and determine what improvements are needed to provide enjoyable and safe experiences for visitors. Each of these priority sites should provide access to clean, functional public restrooms, to improve the guest experience, and these restrooms should be available to day visitors as well as overnight visitors.

While there are a number of camping and RV options, the addition of a cultural tipi stay should be considered in one of the more northern Tribal Nations on this route. Tipi stays are unique in that they not only provide outdoor and socially-distant accommodations, but also offer guests a cultural immersion experience and give Tribal Nations the opportunity to share more of their culture with outside visitors.

TABLE 66: Action plan for establishing accommodation options for Route 2: Oyate Trail

16. PRIORITY INITIATIVE

TIMELINE
Short to Medium Term: Years 1–3

Establish network of campgrounds, RV parks, tipi glamping sites and homestays for Route 2: Oyate Trail

PARTNERS

SD Tourism, Tribal Departments of Economic Development & Planning, Tribal Casinos, lodging businesses

TRIBAL NATIONS

Pine Ridge, Rosebud & Yankton Reservations

DESCRIPTION

The network will aim to provide authentic experiences in the types of accommodations that are growing in popularity during COVID-19. The network will stretch along the Oyate Trail and through the Pine Ridge, Rosebud and Yankton Reservations.

The priority sites to revamp and market along this trail include:

- Lakeside Campground (no reviews)
- Lakota Youth Development Tipi Stays (no reviews)
- Randall Creek Recreation Area (4.7/5 rating)

This route offers a broad range of accommodation options, with many more than listed in these priorities. Native American-owned and managed accommodations, such as the Lakeside Campground and the Tipi Stays are priority accommodations for development.

The two priority campgrounds listed must ensure access to clean and functional public restrooms to improve the guest experience, and these restrooms must be available to day visitors as well as overnight visitors.

TABLE 67: Action plan for establishing accommodation options for Route 3: Yellowstone Trail and Route 4: I-29 tourism route

17. PRIORITY INITIATIVE

TIMELINE
Short to Medium Term: Years 1–3

Establish network of campgrounds, RV parks, tipi glamping sites and homestays for Route 3: Yellowstone Trail and Route 4: I-29 tourism route

PARTNERS

SD Tourism, Tribal Departments of Economic Development & Planning, Tribal Casinos, lodging businesses

TRIBAL NATIONS

Lake Traverse, Standing Rock, Cheyenne River & Flandreau Reservations

DESCRIPTION

The network will aim to provide authentic experiences in the types of accommodations that are growing in popularity during COVID-19. The network will stretch along the Yellowstone Trail and the I-29 tourism route through the Lake Traverse, Standing Rock, Cheyenne River and Flandreau Reservations.

The priority sites to revamp and market along the Yellowstone Trail include:

- The Bay at Grand River Casino (3.5/5 rating
- County Line Campground (4.5/5 rating)
- Little Bend RV Park (3.7/5 rating)

As with Route 1, the two campgrounds receiving ratings of less than 4 out of 5 will need to be revamped to address negative feedback online. It's also important to ask and remind visitors to rate their stay, especially as improvements are made to the sites.

The priority sites to revamp and market along the I-29 tourism route include:

- County Line Campground (4.5/5 rating)
- Flandreau Park (4.5/5 rating)

These two accommodations sites have relatively high ratings, however they offer similar experiences and options to visitors. There are no RV parks in Flandreau or Lake Traverse Reservations; visitors would need to stay off-reservation. Updating one on-reservation campground along this route to include RV access would ensure RV road-trippers have high-quality accommodation options.

As with the other routes, the priority campgrounds must ensure access to clean and functional public restrooms, to improve the guest experience. These restrooms should also be made available to day visitors, not just overnight visitors, to improve access to public facilities on reservations.



Courtesy of South Dakota Department of Toursim

3.4.2 Artisan Markets

Native American arts & crafts is one of the most iconic and important sectors for Tribal Nation communities. Museums, visitor centers, casinos and gas stations are the primary places for artisans and other vendors to sell Native American goods. There are 29 known places for Native American shopping in the Tribal Nations, and at least 17 additional places in popular tourism hubs such as Rapid City and Sioux Falls that sell Native American goods. However, SDNTA members have identified the need for open-air markets and community arts and goods cooperatives near existing and potential attractions on reservations.

Within the new COVID-19 reality, it is critical for Native American artisans and vendors to have marketplaces that are easy to access, open and airy, and located near popular attractions. Table 68 outlines ideas to develop cooperatives and open-air markets.

TABLE 68: Action Plan for establishing artisan markets along tourism routes

18. PRIORITY INITIATIVE

TIMELINE
Short to Medium Term: Years 2–4

Establish artisan cooperatives and open-air markets along tourism routes

PARTNERS

SD Tourism, SD Governor's Office of Economic Development, SD Arts Council, Tribal Departments of Economic Development & Planning, Chambers of Commerce, U.S. Small Business Administration, First Peoples Fund

DESCRIPTION

Though there are numerous locations for artisans and Native American vendors to sell their art, there are very few COVID-19 compliant spaces available near priority attractions identified for development. In partnership with organizations that work to promote Native American culture and create economic opportunities through art, develop a range of simple, fully functional open-air markets and vendor locations near priority attractions on reservations:

1. Conduct an assessment of where art market spaces should be located in proximity to priority anchor attractions along tourism routes.
2. Identify potential funding and development sources and partnerships, including Tribal governments
3. Identify individuals from Tribal Nations who wish to own and manage market spaces on reservations. Provide training and technical assistance in tandem with the development of the space itself.
4. Create business development and management plans, taking into consideration licenses & permits, physical development needs, target markets and alignment with nearby attractions, staff and maintenance needs, and partnerships for development.



Courtesy of Native Governance Center

3.5 Enhance the Welcoming Feel of Main Towns and Priority Attractions

TABLE 69: Priority actions for enhancing the welcoming feel of main towns and priority attractions

STRATEGY	PRIORITY ACTIONS
2.3 Enhance the welcoming feel of main towns and priority attractions	2.3.1 Build iconic entry points in main Tribal Nation communities 2.3.2 Develop community beautification projects that create spaces that the community can be proud of

A tourism experience truly begins when a visitor has arrived at a destination. The feeling of arrival in a place should illustrate the uniqueness of the people, place and history of the community. Unfortunately, for many towns on reservations, there is little in the way of signage or other indicators signaling to visitors that they have arrived in a destination. Members of the SDNTA identified the importance of creating a more "welcoming feel" for primary communities on reservations to set the tone for the interesting and unique experiences available there. Projects to enhance the welcoming feel of main towns and priority attractions on reservations will both improve visitor experience satisfaction and support community pride on reservations. See Tables 70 and 71 for proposed projects.

TABLE 70: Action plan for building iconic entry points in main Tribal Nation communities

19. PRIORITY INITIATIVE

Build iconic entry points in main Tribal Nation communities

TIMELINE
Medium Term: Years 3–5

PARTNERS

Tribal Governments, Bureau of Indian Affairs, SD Tourism, Tribal Departments of Economic Development & Planning, Chambers of Commerce

DESCRIPTION

Build iconic entry points in key Tribal Nation communities to signal to visitors they have arrived at the destination. The entry feature should be themed and symbolically represent the town (e.g., a monument or mural specific to the Tribe). These should include a "Welcome to …" message which should be displayed both in English and the local language.

The entry points should attract attention and stimulate discussion about an element that is truly unique to the place. The residents of each town should be given an opportunity to provide ideas for the monument or entry design to be built.

TABLE 71: Action plan for developing beautification projects in Tribal Nation communities

20. PRIORITY INITIATIVE

TIMELINE
Short to Medium Term: Years 3–5

Develop beautification projects in Tribal Nation communities

PARTNERS

Tribal Governments, Tribal Departments of Economic Development & Planning, Chambers of Commerce, First Peoples Fund, SD Arts Council

DESCRIPTION

Each key town among the tourism circuits will participate in community beautification projects to improve aesthetics and amenities and to create a sense of place in the major towns. Each of these town centers will be upgraded by adding the following features:

- Monument at entry point highlighting a significant part of the town's history or event
- Public restroom
- Improved sidewalks
- Landscaping
- Street furniture
- Lighting
- Garbage silo
- Improved architectural facades
- Organized vending area and seating

Development of these spaces will ensure free visitor facilities such as public restrooms, street furniture and sidewalks are adequate for increasing visitor numbers. These additions will also be available for community use, and will create spaces the community can access and be proud of.

3.6 Develop Public-Private Partnerships for Project Funding

TABLE 72: Priority actions for developing public-private partnerships to fund priority projects.

STRATEGY	PRIORITY ACTIONS
2.4 Develop public-private partnerships to fund development and/or enhancements at priority attractions	2.4.1 With Tribal governments, develop feasibility plans for priority attractions, lodging options, vendor facilities, placemaking and accessibility projects

Tribal government support is essential for the sustainable development and management of tourism in Tribal Nations. Table 73 presents initial considerations for the development of feasibility plans for foundational tourism infrastructure development of priority attractions, lodging, facilities, and other placemaking projects. Feasibility plans should include strategies to secure public-private funding and align with Tribal government priorities.

TABLE 73: Action plan for developing feasibility plans for tourism infrastructure development

21. PRIORITY INITIATIVE

TIMELINE
Short to Medium Term: Years 1–5

Develop feasibility plans for infrastructure development in each Tribal Nation

PARTNERS

Bureau of Indian Affairs, Tribal Game, Fish & Parks/Recreation, Tribal Depts of Wildlife Resources & Management, Tribal Historic Preservation Office, Tribal Departments of Revenue, Tribal Departments of Economic Development & Planning, tribal casinos

DESCRIPTION

With key Tribal government departments, develop feasibility plans for priority tourism development projects including anchor attractions, lodging options, vendor facilities, placemaking and accessibility projects.

The feasibility plans should align with Tribal government priorities so that development done for tourism also benefits communities on reservations. Examples of this can include projects like improvements to public spaces such as parks or community center areas, building more public bathroom facilities, and beautification projects in reservation communities.

Feasibility plans should include strategies to secure public-private funding. Depending on the project scope, COVID-19 funding opportunities could be considered.

3.7 Support Market Readiness of MSTEs

TABLE 74: Priority actions to enhance market readiness of MSTEs

STRATEGY	PRIORITY ACTIONS
3.1 Support market readiness of micro and small tourism enterprises (MSTEs)	3.1.1 Create a Native American tourism business development and market readiness program including training in financial literacy

In Tribal Nations, existing and emerging MSTEs need a range of support services to become viable, market-ready businesses that can sustainably grow and succeed in the tourism industry in South Dakota. Table 75 presents a collaborative initiative to create and implement a business development program that includes foundational training in financial literacy, personal development, basics in starting a business, strategic partnerships, and important consideration for the tourism marketplace. This program will be developed based on the existing services and resources offered by local and regional organizations.

The success of tourism in Tribal Nations depends greatly on the collaboration of tourism businesses, entrepreneurs, and the many organizations that support their development and promotion. To develop a sustainable tourism ecosystem that benefits entrepreneurs and MSTEs in Tribal Nations, the SDNTA will need to create spaces, trainings and other opportunities to foster the connections and organization among entrepreneurs across Tribal Nations that will contribute to a unified voice.

TABLE 75: Action plan for creating a Native American tourism business development and market readiness program

22. PRIORITY INITIATIVE

TIMELINE
Short Term: Years 1–2

Create a Native American tourism business development and market readiness program

PARTNERS

Tribal colleges, Chambers of Commerce, Community Development Financial Institutions, U.S. Small Business Administration, USDA Regional Rural Development, Thunder Valley Community Development Corporation, Lakota Youth Development,
Small Business Development Center

DESCRIPTION

In partnership with workforce development support organizations, create a business development and market readiness program for existing and emerging tourism entrepreneurs that includes essential foundations of financial literacy, personal development, and strategic tourism business development concepts.

Phase 1 elements:

- Foundations in financial literacy terminology and concepts, including checking and savings accounts, tracking income and expenses, budgeting
- Understanding challenges associated with accessing capital, and determining feasible paths for raising capital
- Understanding the important synergies of personal development, community well-being and professional success

Phase 2 elements:

- Basics of setting up and running a tourism enterprise
- Business models and suggested models for various types of MSTEs, including strategic business partnerships that will improve business survival rates
- Range of tourism opportunities in the tourism value chain such as tour guides, tour companies, culinary businesses, recreation, entertainment, crafts, and linkages with other key sectors such as agriculture
- Licensing requirements and the importance of compliance for maintaining tourism standards and marketability
- Packaging, marketing and sales of tourism products and experiences through the local and international tourism distribution systems
- Opportunities for real-world application of concepts such as entrepreneurship challenges, internships, and incubator experiences

3.8 Provide Affordable Financing to MSTEs

TABLE 76: Priority actions to identify affordable financing for MSTEs

STRATEGY	PRIORITY ACTIONS
3.2 Provide affordable financing to help start and grow MSTEs	3.2.1 Advocate for and promote programs that offer affordable financing to MSTEs

Successful MSTEs will be needed in Tribal Nations to support sustained Native American tourism development. Tourism businesses are needed across the sector, including in food and beverage, recreation and entertainment, transportation, accommodation and tour operation.

A critical factor for creating and expanding the pool of tourism-related entrepreneurs in the nine Tribal Nations will be access to affordable financing. The availability and navigability of affordable financing ensures that anyone in the community with a good tourism business idea has access to funding and business development opportunities.



Courtesy of GW International Institute of Tourism Studies

TABLE 77: Action plan for affordable financing promotion programs

23. PRIORITY INITIATIVE

TIMELINE
Short to Medium Term: Years 2–4

Advocate for and promote programs that offer affordable financing to MSTEs

PARTNERS

Community Development Financial Institutions, Four Bands Community Fund, Lakota Funds, First Peoples Fund, U.S. Small Business Administration, USDA Rural Development, SD Governor's Office of Economic Development

DESCRIPTION

There are a variety of programs that offer affordable financing for MSTEs in South Dakota and Tribal Nations. To advocate for and promote these programs to MSTEs and entrepreneurs, the first step is to assess the range of financing opportunities that exist for MSTEs in Tribal Nations. Based on the viable programs, create simple strategic guidelines to support entrepreneurs and MSTEs in understanding how to access and apply for capital to finance their business or new venture idea. This initiative will disseminate the guidelines and work with a cohort of entrepreneurs to assess their experiences through the process.

3.9 Build Tribal Leadership and Community Support and Buy-in for Tourism

TABLE 78: Priority actions to build Tribal leadership and community support for tourism

STRATEGY	PRIORITY ACTIONS
4.1 Build Tribal leadership and community support and buy-in for tourism	4.1.1 Develop an engagement action plan and accompanying regional level activities and events for Tribal Leaders 4.1.2 Launch a tourism community awareness campaign and program in Tribal Nations

Educating Tribal Leaders and residents about tourism and its potential impacts (positive and negative) is an important step in preparing the community and Tribal government to support and participate in tourism. Research indicates that as entrepreneurial endeavors and public awareness increase, residents will be in a better position to participate in tourism development. Tables 79 and 80 outline priority actions for educating Tribal Leaders and residents of Tribal Nations about tourism.

TABLE 79: Action plan for a tourism education and engagement plan for Tribal Leaders

24. PRIORITY INITIATIVE

TIMELINE
Short to Medium Term: Years 1–4

Develop and implement an engagement action plan for Tribal Leaders

PARTNERS

Great Plains Tribal Chairmen's Association

DESCRIPTION

In collaboration with the Great Plains Tribal Chairmen's Association and key partners within each Tribal Nation, develop and implement an action plan to educate and engage Tribal Leaders (Chairmen/Presidents and Tribal Council members) on Native American tourism development and management. Tribal governments and community leaders are essential to the sustainable development and successful management of tourism businesses, attractions, and visitor facilities on reservations. The engagement action plan should include:

- Educational webinars and strategic workshops tailored to educate leaders about the challenges, opportunities, and government roles inherent to tourism development
- Strategic activities to engage Tribal Leaders in the process of assessing infrastructure development, workforce capacity building, and social and environmental needs associated with tourism development on reservations
- Specific opportunities for Tribal government action, including the identification of funding opportunities and the alignment of tourism infrastructure and workforce development plans with government priorities and existing projects.

TABLE 80: Action plan for a tourism community awareness program

25. PRIORITY INITIATIVE

TIMELINE
Short to Medium Term: Years 1–3

Launch a tourism community awareness campaign and program

PARTNERS

Tribal governments, Chambers of Commerce, Tribal colleges

DESCRIPTION

Organize communitywide tourism education and awareness sessions for Tribal Nations that are most ready to leverage tourism as a tool for economic development. The sessions will be made available to the general population, community development committees, government-based organizations, schools and churches, and other service providers and key stakeholders. Members of the SDNTA could be trained as local Native American Tourism Ambassadors and hold sessions in their communities.

The content of the awareness sessions should cover the following key themes

- Potential benefits of tourism in Tribal Nations, including its economic contribution and ways that community members can actively participate
- Possible negative impacts of tourism and discussion around how to manage tourism to ensure negative impacts remain minimal
- Information around the key local attractions that will be developed for tourism, to help instill pride in community offerings
- The role of community members in creating a welcoming and safe destination for visitors, as well as promoting Nation as a destination by sharing information about their natural and cultural heritage
- Highlighting that tourism can occur even where infrastructure requirements are not perfect, and that tourism products can be developed over time

3.10 Improve the Quality of Product and Service Delivery

TABLE 81: Priority actions for improving the quality of product and service delivery

STRATEGY	PRIORITY ACTIONS
4.2 Improve the quality of product and service delivery	4.2.1 Conduct a quality assurance needs assessment for accommodation and tourism service providers 4.2.2 Develop a strategic certification program for the existing and emerging tourism workforce, including on-the-job training opportunities through internships 4.2.3 Provide training in digital technologies needed to address business operation and online marketing requirements in post-COVID-19 reality

The success or failure of Tribal Nations as tourism destinations will depend in large part on how employers and their staff provide quality customer service. Particularly in the new COVID-19 reality, customer service will need to include additional considerations to keep employees and customers safe while also delivering quality services. Customer service training provides employees with a foundation for effective service delivery. Potential benefits of the training may include improved attitude; better communication skills; better understanding of workplace practices; increased morale, confidence and self-satisfaction, and work satisfaction; increased participation; greater career advancement potential; greater interest in and willingness to participate in further training; and more independence.

Current online ratings for accommodations and restaurants in Tribal Nations are average (3.5 on a 1-5 scale), which indicates a need for regionwide focus on quality and service delivery. An initial assessment of quality assurance needs will be required. SD Tourism could be an ideal partner to share the many customer service and hospitality training resources they have available for tourism businesses in the state.

TABLE 82: Action plan for a quality assurance assessment project

26. PRIORITY INITIATIVE

TIMELINE
Short Term: Years 1–2

Conduct an assessment of quality assurance needs of tourism businessess

PARTNERS

Tribal colleges, SD universities, Alliance of Tribal Tourism Advocates, Tribal governments

DESCRIPTION

Assess current gaps in service delivery related to the workforce competencies, customer service and visitor experience. This will involve interviewing stakeholders—including senior management, entry-level staff, and visitors—to determine experience and training needs.

Develop an inventory of tourism-related training offerings within or near the Tribal Nations, to determine capacity to meet plans for growth in tourism. Coordinate with these key institutions to socialize the destination plan and communicate likely growth in tourism, so that they can help support the plan and highlight areas of current programs needing enhancement, or room for addition of new educational programs.

TABLE 83: Action plan for a workforce development program

27. PRIORITY INITIATIVE

TIMELINE
Short to Medium Term: Years 2–4

Develop a certification program and internship opportunities for existing and emerging tourism workforce

PARTNERS

Alliance of Tribal Tourism Advocates, SD Tourism, Tribal colleges, SD universities, Tribal governments

DESCRIPTION

Based on the existing Alliance of Tribal Tourism Advocates curriculum, develop a certification program for the current tourism workforce and individuals interested in working at a tourism attraction or service facility. The program should be strategic in addressing the priority needs identified through the quality assurance assessment project (see Initiative 29 in the previous table). The program will cover key areas:

- Customer service & hospitality
- Visitor experience expectations
- Quality assurance standards
- Gaps in workforce competencies

To encourage the application of concepts learned in the certification program, internship opportunities at existing tourism businesses within South Dakota will be coordinated for participants.

TABLE 84: Action plan for digital technology trainings for tourism businesses

28. PRIORITY INITIATIVE

TIMELINE
Short Term: Years 1–2

Provide COVID-19 compliance trainings in digital technologies and online marketing

PARTNERS

SD Tourism, Small Business Administration

DESCRIPTION

Organize a series of online Digital Technology Studios to help local tourism businesses understand and implement digital technologies into their operations, and develop online marketing tools. The studios will support tourism businesses in the Tribal Nations, and will cover the following key topics:

- Use of contactless solutions during the COVID-19 pandemic to comply with health and safety standards. This will include the use of contactless payment systems across all business types, as well as the use of QR codes to allow for contactless reading of menus or information, contactless ordering, and contactless check-ins.
- E-commerce systems and processes most useful to Native American tourism businesses, as well as training on implementation and use of these technologies and integration into current systems or websites.
- Online marketing workshops, as the use of digital marketing continues to grow throughout this period. Greater detail on online marketing workshops is included in Table 88 (Priority Initiative 31).



Courtesy of GW International Institute of Tourism Studies

3.11 Develop the Region as a Destination

TABLE 85: Priority actions to develop the region as a destination

STRATEGY	PRIORITY ACTIONS
5.1 Develop the region as a destination	5.1.1 Develop a brand architecture and strategy for Native American tourism in South Dakota 5.1.2 Establish a regional network for shared responsibility of tourism management and marketing 5.1.3 Train tourism businesses to promote themselves online 5.1.4 Create a Native American tourism information website, under the management of the SDNTA

Although South Dakota hosted over 14.5 million visitors each year before the pandemic, very few tourists included a visit to a reservation or Native American attraction in their itinerary. Pine Ridge Reservation, with its proximity to the Black Hills and the Badlands, has the highest visitation out of the nine Tribal Nations, but it is only roughly estimated at a maximum of 15,000 visitors per year, based on an economic analysis presented earlier in this plan. Surveys conducted by SD Tourism indicate interest in participating in Native American tourism among South Dakota visitors. In addition to improving existing attractions and developing compelling experiences, there are a number of important tasks in order to increase the awareness of Native American tourism offerings in South Dakota among key market segments.

3.11.1 Brand Development and Management

Tribal Leaders and community and tourism leaders of the Očhéthi Šakówiŋ will need to work together to effectively enhance Tribal Nations as good places to live and work, and to promote the Tribal Nations as attractive travel destinations. A Destination Management Organization (DMO) can help to organize stakeholders into a unified network with a shared vision and objectives for the development, management, and promotion of destinations. Ongoing communication and collaboration among stakeholder groups is critical for Tribal Nations where tourism is just beginning.

The SDNTA can serve as an effective DMO for the Tribal Nations of the Očhéthi Šakówiŋ. Though the official establishment of SDNTA as a DMO will take time, the alliance can begin some immediate efforts to prepare Tribal communities and tourism stakeholders to receive and manage visitors in the years to come. SDNTA can oversee the branding and promotional process, identify priority projects, and apply for grants and secure funds. The DMO should include a cross-section of local individuals, including business owners, government representatives, educators, and other tourism professionals.

Table 86 outlines steps to develop a brand architecture and strategy for the Očhéthi Šakówiŋ. Table 87 outlines an initiative to establish a regional network to manage and market tourism in the region.

TABLE 86: Action Plan for a brand architecture and strategy

29. PRIORITY INITIATIVE

TIMELINE
Short Term: Year 1–2

Develop a brand architecture and strategy for the Očhéthi Šakówiŋ

PARTNERS

SD Tourism, SD Missouri River Tourism

DESCRIPTION

Use the results of the SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis conducted in the development of this plan to help define the appropriate brand and strategy to use across the nine Tribal Nations. A follow up SWOT exercise should be conducted to build on the insights and findings presented in the NATDMP.

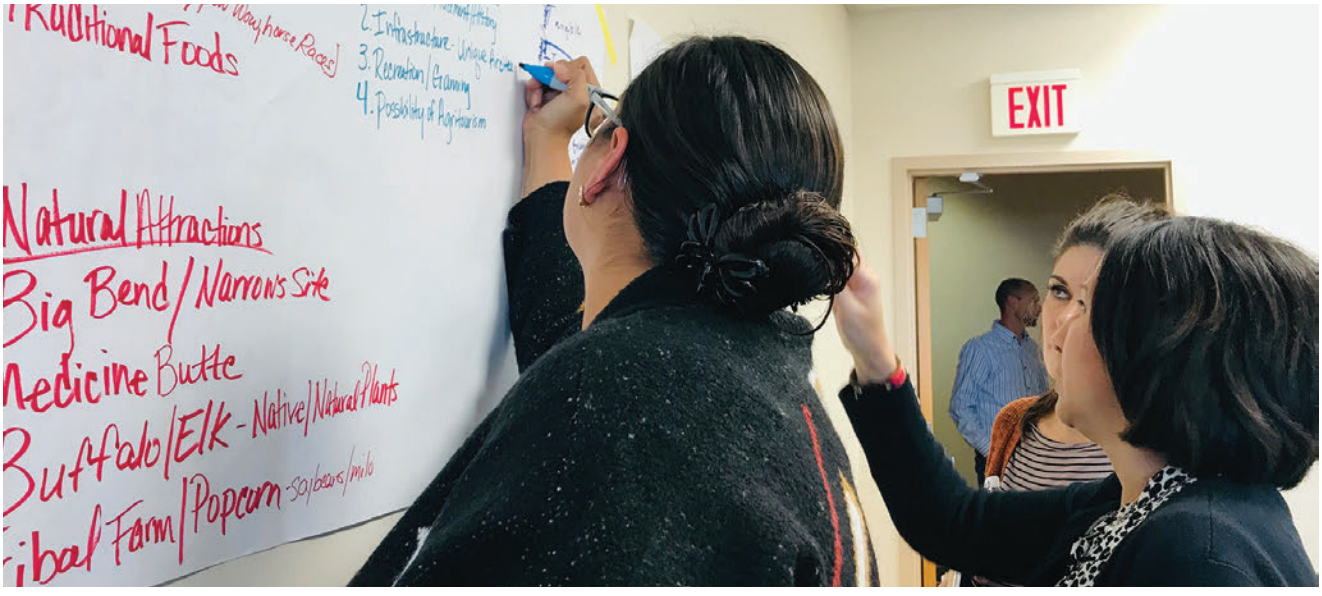
Organize and conduct stakeholder workshops and interviews for all nine Tribal Nations to ascertain exactly how stakeholders feel about the Tribal Nations, and to identify their unique characteristics. This step would involve the development, distribution, and assessment of stakeholder surveys along with the organization of collected data. Targeted stakeholders would include community members, business owners, public sector representatives, and representatives from gateway communities and nearby tourist hubs. The purpose of the exercise is to determine the key attributes, personality and heritage that characterize the Tribal Nations as they are right now. How do residents feel about this location? What makes them most proud to call this home? It's important to establish a baseline around the brand reputation, both from within the Tribal Nations and from gateway communities. The brand should be based on existing characteristics.

Identify current and potential visitors, to assess feeder markets and to segment these markets by income, education, interests and spending habits. Before attempting to attract visitors, it's important to determine who these Nations will be most likely to attract. The market analysis should build on the priority market segments prioritized in the NATDMP, and should complement current South Dakota tourism markets.

Determine the unique selling proposition for each Tribal Nation, and for Tribal experiences across this region. Which historic, cultural and natural assets could be further enhanced and developed? Which assets could be packaged as a cohesive outdoor or cultural experience? What would attract people to the Tribal Nations and what would they most likely spend their money on?

After determining the unique selling proposition for the Tribal Nations, further articulate the brand's overall identity and "brand promise," which would allow visitors to reliably anticipate what they will experience when they visit these communities. This would act as the foundation for storytelling about the Tribal Nations and their visitors.

Develop a visual identity, logos, taglines, signage and promotional collateral, including digital brochures, that would reflect the brand and position it visually. Colors, typography and language should all reflect the brand essence.



Courtesy of GW International Institute of Tourism Studies



Courtesy of South Dakota Department of Toursim

TABLE 87: Action plan for a regional tourism marketing network for the Očhéthi Šakówiŋ

30. PRIORITY INITIATIVE

TIMELINE
Medium Term: Years 3–4

Establish a regional network (SDNTA) for shared responsibility of tourism management and marketing

PARTNERS

Tribal governments, SD Tourism, SDNTA

DESCRIPTION

In addition to the shared responsibility of regional tourism management among the Očhéthi Šakówiŋ, it is important for there to be a network that is the steward of the brand, marketing, and promotion of the region as a destination. The regional marketing network will:

- Help promote and market Native American attractions, accommodation options, tourism services, transportation, shopping, restaurants, and events
- Educate visitors and tourism service providers (in hubs and gateway communities) about appropriate etiquette when visiting reservations
- Manage a centralized website for all visitor information for the nine Tribal Nations
- Support development of Tribal Nation economies as a result of increased and sustainable tourism

Historically, DMOs were primarily responsible for the marketing of a destination, and only in more recent years have DMOs taken on the equally important tasks of management within the destination. Priority Initiative 40 outlines the essential management aspects and development needs of SDNTA as the regional DMO for the Očhéthi Šakówiŋ.

3.11.2 Improve Online Marketing of Native American Tourism in South Dakota

Of the 145 known Native American attractions in South Dakota, only 49% have online ratings. In tandem with the enhancement of attractions and the development of new tourism experiences, entrepreneurs and MSTEs need to improve their marketing through digital platforms and their overall presence online.

Especially during the current pandemic, online marketing has become an essential pillar in the success of tourism businesses globally. Tables 88 and 89 present initiatives that will support entrepreneurs and tourism businesses in their own online marketing efforts, and create a central website with all pertinent information for potential visitors interested in experiences in Tribal Nations.

TABLE 88: Action plan to train tourism business in online promotion

31. PRIORITY INITIATIVE

TIMELINE
Short to Medium Term: Years 1–4

Train tourism businesses to promote themselves online

PARTNERS

SD Tourism

DESCRIPTION

Develop and offer a series of online annual workshops on the following topics, to ensure Native American tourism businesses remain up to date with online marketing trends:

- **Websites:** Simple, attractive and easy-to-use websites are essential for tourism businesses. These types of websites can be built on a modest budget but realize great return on investment for businesses.
- **Storytelling and content production:** Native American tourism businesses need to convey what they do and convince consumers to care. They need to tell stories to these visitors, both in writing and in pictures. For example, a business located near Badlands National Park might include an illustrated map of popular hikes, and images of the trails.
- **Social media marketing:** Most travelers today learn about a destination via social media—for example, Facebook, Instagram, or Twitter—and this trend is only increasing during the current pandemic. It's important for Native American tourism businesses in the Tribal Nations to use these platforms as promotional tools. A social media marketing workshop could provide locals with the information necessary to get started.
- **Networking and partnerships:** With guidance, local businesses could learn the importance of and strategies for developing relationships between businesses within the Tribe and with other Nations. Native American tourism businesses should, over time, form a tourism association to help these businesses unify and become well represented throughout the tourism development process. This association could also help to organize collective marketing and promotional efforts. A workshop in networking and forming strategic partnerships will assist tourism businesses in understanding the benefits of associations, as well as implementation and operation processes.

TABLE 89: Action plan for a visitor-oriented page on SDNTA website

32. PRIORITY INITIATIVE

TIMELINE
Short Term: Years 1–2

Create a Native American tourism information website, under the management of the SDNTA

PARTNERS

Web Developer

DESCRIPTION

Develop a consumer-facing interface as part of the SDNTA website that will provide visitors with overall information about the Tribal Nations. The website will include cultural information, transportation, tours, hotels, restaurants, and information on tourist sites for each of the Nations. There's an opportunity to include links to various businesses, and to build the website to serve as a booking platform—particularly for tours developed by the Tribal Nations.

3.12 Develop Strategic Industry Partnerships

TABLE 90: Priority actions for developing strategic partnerships

STRATEGY	PRIORITY ACTIONS
5.2 Develop strategic partnerships to foster a greater understanding of Native American communities and promotion of Native American tourism	5.2.1 Create Familiarization Tours for tour operators, tourism service providers, gas stations, and visitor center personnel 5.2.2 Prepare Native American tourism business and attraction managers to attend trade shows and establish industry networks 5.2.3 Create cultural awareness and Native American tourism education programs for non-Native American tour operators and gateway community tourism services providers 5.2.4 Develop a central place as a regional information center and venue for events and trainings 5.2.5 Develop a regional visitor etiquette guide for visitors and tour operators

With tourism as the second largest industry in the state of South Dakota, bringing in around $4.1 billion in visitor spending in 2019, there is immense opportunity for Tribal Nations to benefit from visitors, much like other parts of the state have. It is important for tourism stakeholders in Tribal Nations to build strategic partnerships throughout the industry in order to benefit from the existing flow of visitors and tourism revenue currently profiting the state.

3.12.1 Building Strategic Partnerships in the Industry

Due to historic tensions between Native American and non-Native American communities, it is essential for people unfamiliar with the culture, history, and place of Tribal Nations to become educated and positive partners in the promotion of tourism in Native American communities. South Dakota hosts hundreds of thousands of road-trippers each year—a market segment known to make multiple stops at various destinations, and open to recommendations from tour operators, service providers, and visitor center personnel.

Tables 91 and 92 outline initiatives designed to collaboratively connect Tribal Nation tourism businesses with strategic partners. This includes educating non-Native American tourism stakeholders, particularly in tourism hubs and gateway communities, about the unique tourism experiences available on reservations through Familiarization Tours and cultural awareness programs. Additional capacity building opportunities should be created for Native American tourism businesses & entrepreneurs to attend trade shows and establish industry networks.



Courtesy of GW International Institute of Tourism Studies

TABLE 91: Action plan for creating Familiarization Tours

33. PRIORITY INITIATIVE

TIMELINE
Short to Medium Term: Years 1–4

Create Familiarization Tours for SDNTA members, tour operators, tourism service providers, gas stations, and visitor center personnel

PARTNERS

SD Tourism, Alliance of Tribal Tourism Advocates, Convention and Visitor Bureaus, SD Missouri River Tourism, Visitor Centers, Tour Operators

DESCRIPTION

Familiarization Tours ("Fam Tours") are an important and useful tool for destination, attraction, and service managers. They provide an opportunity to educate industry partners about experiences and services while simultaneously gathering feedback from industry experts about ways to improve business operations and marketing efforts.

Fam Tours should be created for each priority tourism route, following a set itinerary experience and showcasing priority attractions, lodging, and tourism services. Multiple Fam Tours should be created and conducted for a range of groups, starting with members of the SDNTA and followed by groups of tour operators, tourism service providers, and other key tourism hub and gateway community tourism personnel (e.g., visitor centers, gas stations, rental car companies, etc).

TABLE 92: Action plan to prepare businesses and managers to establish tourism industry networks

34. PRIORITY INITIATIVE

TIMELINE
Medium Term: Years 3–5

Prepare Native American tourism business and attraction managers to attend trade shows and Industry events to establish industry networks

PARTNERS

SD Tourism, SD Missouri River Tourism, Pine Ridge Area Chamber of Commerce, Red Cloud Indian School Heritage Center

DESCRIPTION

Trade shows and industry events are a conventionally important part of successfully growing tourism. These events create unique opportunities for industry stakeholders (local and international) to come together to learn about new exciting offerings to promote within their networks or consider for strategic partnerships. Attendees of these events include managers of attractions, accommodations, service facilities, tour operators, and marketing and management organizations (local, regional, and national).

In January 2020, a dozen members of SDNTA capitalized on the opportunity to attend the South Dakota Governor's Conference on Tourism. The event draws thousands of tourism stakeholders to attend, learn, and network, with the ultimate goal of continuing to grow tourism in South Dakota.

This initiative will provide resources and knowledge-sharing opportunities to prepare existing and emerging tourism businesses and attraction managers to attend and maximize the benefits of the South Dakota Governor's Conference on Tourism, as well as other priority industry events. Current members of SDNTA, including SD Missouri River Tourism, the PRACC, and RCIS-HC, could provide their insights on ways to successfully engage with industry stakeholders and build strategic networks.

TABLE 93: Action plan for creating cultural awareness programs

35. PRIORITY INITIATIVE

TIMELINE
Short to Medium Term: Years 1–4

Create cultural awareness and Native American tourism education programs for non-Native American tour operators and gateway community tourism services providers

PARTNERS

SD Tourism, SD Missouri River Tourism

DESCRIPTION

One of SDNTA's highest priorities is to support the creation and use of cultural awareness programs intended to educate non-Native American tour operators and gateway community tourism service providers, with the goal of building positive cross-cultural relationships and improving the promotion of Native American tourism throughout South Dakota.

Cultural awareness programs can be created as a prerequisite for Fam Tour opportunities, and should be promoted/hosted by influential partners of SDNTA, including SD Tourism and SD Missouri River Tourism. The program should include activities that are educational and result in greater participant understanding of:

- The history and authentic modern-day life of communities on reservations
- The beautiful and unique experiences, attractions, and tour opportunities in Tribal Nations
- Existing infrastructure challenges and proposed (and improving) solutions to those challenges

A page on the future SDNTA website will be dedicated to resources that support cultural awareness education for tourism stakeholders and reservation gateway communities.

3.12.2 Managing Visitors Directly

In addition to educating tour operators, service providers, and visitor center personnel in tourism hubs and gateway communities, it is important for Tribal Nations, through the leadership of the SDNTA, to manage and guide visitors directly. At numerous meetings, SDNTA members identified the need for a central location to be used as a regional Native American tourism information center and a venue for events and trainings. As the location is currently underutilized and holds great significance for the Očhéthi Šakówiŋ, the Wakpa Sica Reconciliation Place was recommended for consideration. Table 94 presents the initiative to establish a central Native American Tourism Information Center.

Visitor behavior was identified by members of the SDNTA as one of the greatest concerns of Native American communities on reservations, particularly in regards to attendance at events, cultural ceremonies, and sites and monuments. Over the years various visitor etiquette guides have been created and shared to educate visitors about the correct protocol and guidelines while visiting a reservation. Table 95 outlines an initiative to create a single comprehensive Visitor Etiquette Guide that is used across all nine Tribal Nations in South Dakota.



Courtesy of GW International Institute of Tourism Studies

TABLE 94: Action plan for a central information center and venue for the Očhéthi Šakówiŋ

36. PRIORITY INITIATIVE

TIMELINE
Short to Medium Term: Years 1–5

Develop a central place as a regional information center and venue for events and trainings.

PARTNERS

SD Tourism, SD Governor's Office of Economic Development, foundations, Treaty Councils, Bureau of Indian Affairs

DESCRIPTION

In 2000, Congress authorized the Wakpa Sica Historical Society (WSHS) to receive $18.2 million in grants from the Department of Housing and Urban Development (HUD) to build the Wakpa Sica Reconciliation Place on land it placed in trust for eleven Tribes of the Sioux Nation. The facility was intended to house an economic development center, the Tribal Judicial Support Center, the Native American Mediation Training Center, and the Sioux Nation Supreme Court. The center would also display and interpret Tribal history, art and culture.

The center is located along North Highway 1806 outside of Fort Pierre, at the confluence of the Bad and Missouri Rivers. Notably, the first key meeting between Chief Black Buffalo and other leaders of the Sioux Nation and Lewis and Clark and representatives of the United States took place on this site. The placement of this land in trust for the Sioux Nation (through Title IV of the Omnibus Indian Advancement Act, Public Law 106-568, in December 2000) is of great historic and cultural significance: It is the first time that land once part of the Great Sioux Reservation established by the Fort Laramie Treaty of 1868 but currently outside the boundaries of any reservation has been returned to the Sioux Nation.

With its historic importance and central location, the Wakpa Sica facility is an ideal location for a physical tourism information center for the Očhéthi Šakówiŋ. To pursue this initiative, members of SDNTA need to re-establish funding and resource partners, determine the scope of offerings and services at the center, and create a management framework to share responsibilities for the development and use of the center for the purposes of growing Native American tourism for the Očhéthi Šakówiŋ.

TABLE 95: Action plan for a visitor etiquette guide for visitors and tour operators

37. PRIORITY INITIATIVE

TIMELINE
Short Term: Years 1–2

Develop a visitor etiquette guide for visitors and tour operators

PARTNERS

Tribal governments, Tribal Event Planning Committees, SD Missouri River Tourism, Alliance of Tribal Tourism Advocates

DESCRIPTION

Collect and assess existing visitor etiquette guidelines from the Tribal Nations. Based on these guidelines and industry standards, design and promote a statewide visitor etiquette guide for visitor behavior while on reservations. The guide should include enough information to ensure visitors are aware of local customs, but be general enough to provide conduct guidance across all nine Tribal Nations.

The visitor etiquette guide should cover the topics of:

- Access to tribal lands and areas that are off-limits to visitors
- Visitor behavior related to photography restrictions, appropriate attire while on the reservation, treatment of natural resources, and specific gestures that may be perceived as disrespectful
- The need to observe Tribal laws around prohibited items, Tribal permits for hunting and fishing, and laws around removing artifacts from tribal lands
- Visitor etiquette and expected behavior at cultural events and wacipis



Courtesy of South Dakota Department of Toursim

3.13 Reach Diversified Market Segments

TABLE 96: Priority actions to reach diversified market segments

STRATEGY	PRIORITY ACTIONS
5.3 Reach diversified market segments	5.3.1 Develop strategic action plan with SD Tourism to promote Native American tourism 5.3.2 Develop and implement a marketing strategy

In time, when visitation increases and regulations to prevent the spread of COVID-19 are established for visitors, Tribal Nations will need to develop and implement marketing strategies that include public relations, earned media, and free media. Marketing efforts will need to be monitored and adjusted to reach priority market segments, including road-trippers, outdoor enthusiasts, and culture tourists. As the pandemic unfolds, marketing and promotion strategies will need to adjust to the needs of target markets. Tables 97 and 98 present initiatives to develop a strategic promotion action plan for Native American tourism with SD Tourism and to create and implement a regional marketing strategy.

TABLE 97: Action plan for a strategic action plan with SD Tourism

38. PRIORITY INITIATIVE

Develop a strategic action plan with SD Tourism to promote Native American tourism

TIMELINE
Short Term: Years 1–2

PARTNERS

SD Tourism

DESCRIPTION

SD Tourism is an important partner for the marketing and promotion of Native American tourism throughout South Dakota. In collaboration with SD Tourism, create a strategic action plan that will result in attracting diversified target market segments to anchor attractions and events in the Tribal Nations, and encourage visitors to book unique experiences along tourism routes connecting multiple reservations.

The strategic action plan should include an assessment of attractions and facilities to promote; confirmation of brand, messaging, and promotion established by the SDNTA; and a timeline for implementation and monitoring.

TABLE 98: Action plan for a marketing strategy

39. PRIORITY INITIATIVE

TIMELINE
Medium Term: Years 3–4

Develop and implement a marketing strategy

PARTNERS

SD Tourism, SD Missouri River Tourism, Tribal governments

DESCRIPTION

Develop a destination marketing strategy across the Očhéthi Šakówiŋ that includes development of social media campaigns aimed at target market segments on platforms including Facebook, Instagram and Twitter. The strategy should identify brand ambassadors to promote the Tribal Nations on social media.

The marketing strategy should include tactics for promoting the Tribal Nations to inbound operators that offer tours to nearby attractions; hosting travel media, outbound travel agents, and tour operators interested in Native American and community tourism; and attending trade shows and other events to expose the Tribal Nations to a larger audience.

It is envisioned that the marketing strategy will be developed after the DMO is established. The DMO will be responsible for implementation of the marketing strategy. For this reason, this priority action is tagged as medium term.

3.14 Establish Tourism Management and Plan Implementation Mechanisms

TABLE 99: Priority actions for establishing tourism management and plan implementation mechanisms

STRATEGY	PRIORITY ACTIONS
6.1 Establish tourism management and plan implementation mechanisms	6.1.1 Establish a functioning and sustainable regional network (the SDNTA) to share responsibility for management of tourism development and promotion 6.1.2 Guide and support establishment of tourism offices in Tribal Nations

For there to be sustainable Native American tourism with a collaborative marketing approach that unifies the Očhéthi Šakówiŋ, it is essential to establish a functioning regional network to share responsibilities for management of tourism development and promotion. The South Dakota Native Tourism Alliance can become an official Destination Management and Marketing Organization supporting Tribal Nations in all aspects of tourism development and management. The SDNTA would be the steward of Native American tourism needs across the Očhéthi Šakówiŋ, and the vehicle for advocacy on behalf of the sector.

Additionally, Tribal governments currently have no official tourism offices or positions overseeing tourism development and management. As each Tribal Nation has unique tourism challenges and opportunities, it is important for there to be a position or office to address the needs of each Tribal Nation. As a part of this plan, GW IITS and the SDNTA will guide and support individuals to establish tourism offices in Tribal governments in cases where Tribal Nations have expressed an interest in doing so.

TABLE 100: Action plan for establishing the South Dakota Native Tourism Alliance

40. PRIORITY INITIATIVE

TIMELINE
Short to Medium Term: Years 1–3

Establish a functioning and sustainable regional network (the SDNTA) to share responsibility for management of tourism development and promotion

PARTNERS

SDNTA

DESCRIPTION

According to the UNWTO, destination management is "the coordinated management of all the elements that make up a tourism destination (attractions, amenities, access, marketing and pricing)."[113] A DMO's responsibilities should include a process that effectively and harmoniously addresses the interactions between visitors, the tourism industry, the community that hosts them, and the environment.

As a regional DMO for the Očhéthi Šakówiŋ, SDNTA would be the steward of:

- Native American tourism development and management
- Brand creation, marketing and promotion
- Advocacy of tourism needs and opportunities at the Tribal Nation, South Dakota state, and U.S. federal levels
- Coordination of all industry stakeholders including public, private, education and nonprofit institutions

To establish SDNTA as an official DMO, SDNTA members need to determine an organization structure, governance, funding streams, and a coordination framework with Tribal and non-Tribal partners.

TABLE 101: Action plan for supporting the establishment of tourism offices in Tribal Nations

41. PRIORITY INITIATIVE

TIMELINE
Short to Medium Term: Years 1–5

Action plan to support establishment of tourism offices in Tribal Nations

PARTNERS

Tribal governments, Chambers of Commerce

DESCRIPTION

For the successful development and management of tourism for each Tribal Nation, it is important that there be an established, official office or position solely dedicated to tourism for that Nation. At times many of the nine Tribal Nations have had an office or official position focused on tourism, but currently there are no official tourism offices in the various Tribal governments.

SDNTA, with support from GW IITS, will create a practical guide for Tribal Governments that will outline the many considerations and pathways for establishing local tourism offices. The practical guide can be used by Tribal Nations to create their action plan and identify resources. The guide will address considerations such as:

- Governance: goals, mission, vision, and alignment with Tribal government priorities
- Structure: staffing, roles & responsibilities, department linkages
- Funding: funding opportunities, private- and public-sector partnerships
- Projects: community and leadership education & engagement, tourism infrastructure development, workforce capacity building, marketing, and visitor management

Tribal Nation tourism offices will hold leadership roles in the SDNTA.

[113] UNWTO (2019). UNWTO Guidelines for Institutional Strengthening of Destination Management Organizations. Retrieved from https://www.e-unwto.org/doi/pdf/10.18111/9789284420841

3.15 Attract Investors and Plan Implementation Partners

TABLE 102: Priority actions for attracting investors and plan implementation partners

STRATEGY	PRIORITY ACTIONS
6.2 Attract investors and plan implementation partners	6.2.1 Promote opportunities to prospective funders, and secure the buy-in of partners 6.2.2 Support Tribal Nations in assessing opportunities for generating and managing tourism tax revenue

This plan outlines a wide range of tourism development projects. There is a need to socialize these opportunities with Tribal governments, state and federal partners and private sector. The successful implementation of the plan is contingent on strategic partnerships and public-private investment. Exploring ways to generate and manage tourism tax revenue should be given priority attention since it may provide much needed seed funding for tourism development projects as well as the establishment of local tourism offices. Tables 103 and 104 describe priority actions for securing implementation partners and investors.

TABLE 103: Action plan for promoting to prospective funders and securing the buy-in of partners

42. PRIORITY INITIATIVE

TIMELINE
Short to Medium Term: Years 1–3

Promote opportunities to prospective funders and the secure buy-in of partners

PARTNERS

U.S. Small Business Administration, USDA Regional Rural Development, SD Governor's Office of Economic Development, First Peoples Fund, Lakota Funds, Bush Foundation, Four Bands Community Fund, Native American Bank, John T. Vucurevich Foundation, Aroha Philanthropies, Northwest Area Foundation, South Dakota Municipal League, Dakota Indian Foundation, Tribal banks and credit unions

DESCRIPTION

Attract development of infrastructure, tourism attractions and experiences in the Tribal Nations through local and national investment. There is a need to develop an investment prospectus for major attractions and product development opportunities outlined in the NATDMP. This process will also be guided by principles of sustainability and inclusion. Priority actions should include:

- Convene key government entities to further prioritize tourism investment opportunities outlined in the NATDMP
- Package tourism opportunities for local investors (investment prospectus)
- Promote opportunities to investors through relevant channels, ensuring right-fit investors that commit to the guiding principles of sustainable and inclusive development



Courtesy of South Dakota Department of Toursim

TABLE 104: Action plan for assessing opportunities to generate and manage tourism tax revenue

43. PRIORITY INITIATIVE

TIMELINE
Short to Medium Term: Years 1–5

Assessment of opportunities to generate and manage tourism tax revenue

PARTNERS

Chambers of Commerce, Tribal Departments of Economic Development and Planning, Tribal Department of Revenue, SD Tourism, SD Department of Tribal Relations

DESCRIPTION

As seen in Section 1.8, tourism tax revenue is not currently fully reported or maximized. Tax revenue can be one of the primary sources for funding infrastructure development projects and establishing tourism offices.

To understand the potential of tourism tax revenue, each Tribal Nation will need to assess opportunities to generate and sustainably manage tax revenue. It is important to establish an understanding of current tourism tax agreements, reporting, and procedures. Once a Tribal Nation's current situation is fully understood, it will be easier to identify potential opportunities to generate and manage revenue from tourism taxes.

3.16 Monitor Plan Implementation

TABLE 105: Priority actions for successful plan implementation

STRATEGY	PRIORITY ACTIONS
6.3 Monitor plan implementation	6.3.1 Develop key performance indicators 6.3. 2 Track progress and challenges and adapt strategies and priority actions as needed over time

Successful plan implementation will require diligent oversight from GW IITS and the SDNTA in the short term, and SDNTA in the medium to long term. Progress and challenges should be tracked, and strategies and priority actions adapted over time to meet ever-changing local evel realities and needs.

The key performance indicators outlined below can help GW IITS and the SDNTA monitor the impacts of the plan over time. Table 106 outlines key performance indicators for NATDMP implementation.

TABLE 106: Key performance indicators for NATDMP implementation

GOAL	KEY PERFORMANCE INDICATOR
1. Create and deliver iconic Native American tourism experiences	1.1 Public and private investment in priority experiences 1.2 Number of new experiences (virtual and on the ground) 1.3 Number of staff trained under service, hospitality, and COVID-19 compliance programs 1.4 Increase in visitor satisfaction
2. Improve infrastructure and placemaking	2.1 Increase in signage to key Native American attractions on reservations 2.2 Public and private investment in priority attractions, accommodations, and public facilities 2.3 Number of new attractions, accommodations, and public facilities in Tribal Nations
3. Enable tourism business success and viability	3.1 Number of business development education and awareness programs 3.2 Increase in new tourism enterprises 3.3 Increase in tourism enterprises receiving affordable financing 3.4 Increase in number of tourism enterprises that are operating formally and complying with existing standards
4. Prepare community and skilled workforce in tourism	4.1 Number of tourism awareness campaigns and programs 4.2 Number and levels of training programs in tourism and hospitality and range of topics 4.3 Investment from Tribal governments and NGOs for workforce development programs 4.4 Increase in number of people who participate in training programs in tourism and hospitality
5. Increase awareness of Native American tourism offerings in South Dakota among key market segments	5.1 Increase in number of regional marketing and promotion campaigns led by the SDNTA 5.2 Increase in number of tourism enterprises promoting online 5.3 Number of cultural understanding trainings and educational campaigns for tour operators and gateway communities 5.4 Creation and distribution of a regional Visitor Etiquette Guide 5.5 Number of day visitors to and expenditures in Tribal Nations
6. Manage tourism collaboratively	6.1 Establishment of a functional regional tourism management network/organization 6.2 Number of tourism offices/positions in Tribal governments 6.3 Number of funding and implementation partners committed to delivering the NATDMP 6.4 Increase in tourism tax revenues for Tribal Nations



Courtesy of South Dakota Department of Toursim