

Case Studies



Case Study Matrix

To inform Henderson County’s long-term destination development strategy, Hunden conducted a review of comparable and aspirational destinations that have successfully leveraged festivals, events, placemaking, and targeted investment to strengthen their visitor economies while maintaining community character. These case studies are intended to provide context, benchmarks, and practical insight into how peer communities have approached tourism development, event programming, and asset activation in ways that are relevant to Henderson County’s scale, market access, and values.

The selected destinations reflect a range of community sizes, geographic contexts, and maturity levels, including direct regional peers as well as aspirational examples that demonstrate what is achievable over time with sustained leadership and coordinated investment.

ASPIRATIONAL CASE STUDY ANALYSIS

Destination	Population	Median HH Income	Diversity Index (Out of 100)	Rationale
Chattanooga, TN	189,671	\$67,142	67.3	Aspirational regional destination, transformative riverfront investment, long-term vision alignment
Loveland, CO	79,815	\$82,287	46.9	Outdoor-oriented destination, arts-led identity, relevant model for balancing growth and quality of life
Johnson City, TN	75,231	\$57,116	42.9	Regional hub, mixed-use revitalization, applicable lessons for year-round visitation growth
Spartanburg, SC	41,161	\$52,610	64.1	Regional city, downtown reinvestment success, transferable placemaking strategies with youth sports
Boone, NC	19,773	\$33,084	52.4	In-state mountain destination, outdoor-driven tourism, strong relevance to Henderson County’s visitor base
Waynesville, NC	10,839	\$54,474	33.7	Comparable mountain community, heritage-led downtown, direct parallels to Henderson County’s scale
Henderson County, NC	121,109	\$65,452	49.0	—

Chattanooga, TN

Destination Snapshot

Midsized city has undergone a nationally recognized transformation driven by sustained investment in its downtown and riverfront. Chattanooga now serves as a major regional tourism and economic hub.

Tourism Strategy

Positions itself as a year-round destination through signature attractions, outdoor recreation, conventions, and large-scale event programming.

Key Elements

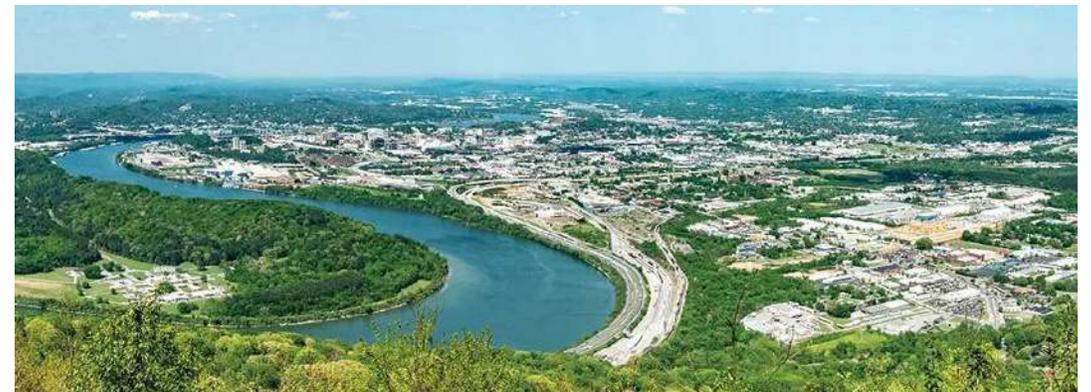
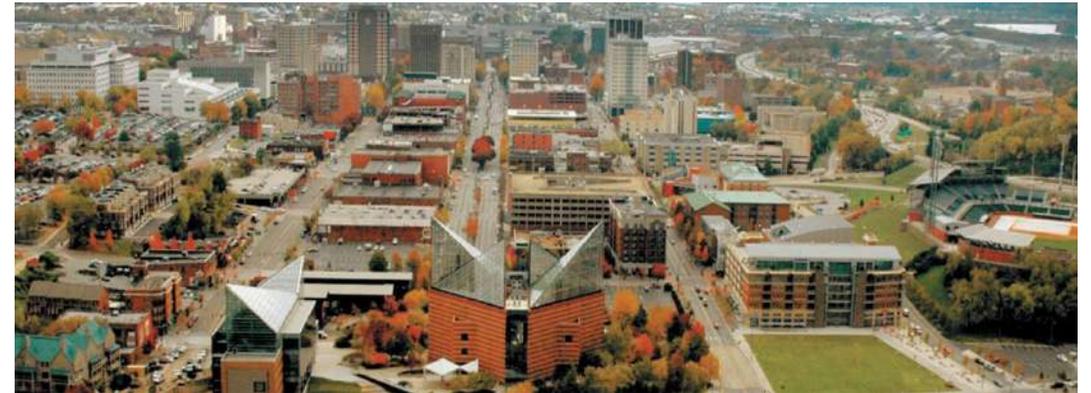
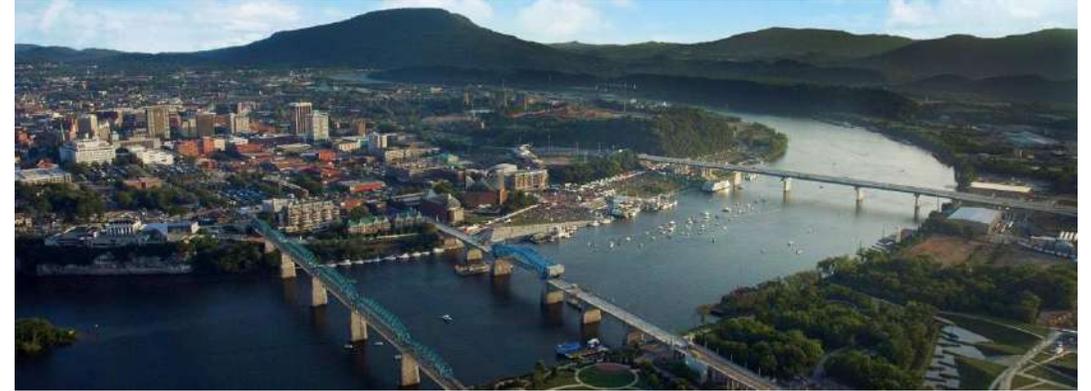
Riverfront redevelopment, iconic attractions, convention facilities, extensive trail and greenway networks, and high-quality public spaces.

Funding Model

Significant long-term public investment, dedicated tourism and sales taxes, public-private partnerships, and coordinated capital planning.

Takeaways for Henderson County

Represents an aspirational example of how catalytic investments and long-term vision can redefine a destination's regional and national profile.



Loveland, CO

Destination Snapshot

Front Range community positioned between major metro areas, known for outdoor recreation, arts, and a strong community-focused identity. Loveland benefits from proximity to both natural assets and regional population centers.

Tourism Strategy

Balances outdoor tourism growth with arts-led placemaking and cultural programming to maintain quality of life for residents while attracting visitors.

Key Elements

Arts districts, sculpture parks, trail systems, craft beer, festivals, downtown public spaces, and access to regional outdoor destinations.

Funding Model

Local tax initiatives, voter-approved funding measures, public investment, and partnerships with arts organizations and private developers.

Takeaways for Henderson County

Provides a model for aligning tourism growth with community values, arts investment, and long-term livability.



Spartanburg, SC

Destination Snapshot

Regional city that has transitioned from an industrial economy to a revitalized downtown with growing cultural and recreational appeal. Spartanburg serves as a regional center for arts and education.

Tourism Strategy

Uses placemaking, cultural investment, and event-driven programming to reposition the city as a visitor-friendly destination while supporting economic development goals.

Key Elements

Downtown public spaces, cultural institutions, sports and event facilities, trail networks, and mixed-use redevelopment projects.

Funding Model

Public-private partnerships, local hospitality taxes, philanthropic contributions, and strategic public investment in catalytic projects.

Takeaways for Henderson County

Highlights the importance of coordinated investment, partnerships, and leadership in driving downtown and destination transformation.



Johnson City, TN

Destination Snapshot

Midsized regional city serving as an economic, medical, and educational hub for Northeast Tennessee and surrounding rural areas. Johnson City blends urban amenities with proximity to outdoor recreation.

Tourism Strategy

Diversifies visitation through sports tourism, event programming, downtown redevelopment, and integration of outdoor recreation assets. The city focuses on year-round demand generation.

Key Elements

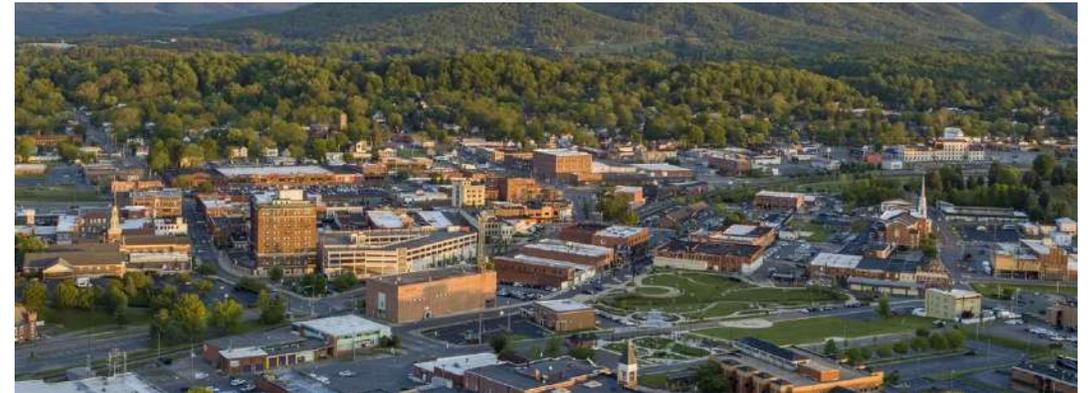
Revitalized downtown districts, event venues, trail and greenway connectivity, university-related demand, and regional healthcare and education anchors.

Funding Model

Combination of local government funding, tourism taxes, institutional partnerships, and targeted capital investments in public spaces and venues.

Takeaways for Henderson County

Shows how regional hubs can broaden tourism demand while simultaneously investing in resident-serving infrastructure.



Waynesville, NC

Destination Snapshot

Historic mountain town with a compact, walkable downtown and a strong arts and heritage identity, attracting leisure travelers seeking authenticity. Waynesville functions as a gateway community to surrounding natural assets.

Tourism Strategy

Focuses on heritage, arts, and small-scale events to drive consistent visitation rather than large-volume tourism. The strategy prioritizes quality experiences and downtown vitality.

Key Elements

Main Street revitalization, arts and crafts economy, local festivals, independent retail, and access to hiking, scenic drives, and outdoor recreation.

Funding Model

Local public investment, grants, tourism tax support, and partnerships with arts organizations and small businesses.

Takeaways for Henderson County

Illustrates how modest-scale, place-based investments can strengthen downtown vibrancy and visitor appeal without overdevelopment.



Boone, NC

Destination Snapshot

Small Appalachian mountain town anchored by a major university, serving as a regional hub for outdoor recreation, seasonal visitation, and cultural activity. Boone benefits from strong brand recognition tied to the Blue Ridge Mountains and Appalachian State University.

Tourism Strategy

Leverages outdoor assets, collegiate activity, and seasonal events to drive visitation while actively managing capacity and infrastructure pressures during peak periods. Emphasis is placed on extending shoulder-season travel and diversifying visitor experiences.

Key Elements

Downtown retail and dining, extensive trail systems, university-driven sporting and cultural events, and proximity to Blue Ridge Parkway recreation assets.

Funding Model

Primarily supported by lodging tax revenues, public investment in infrastructure, and partnerships with the university, state agencies, and local nonprofits.

Takeaways for Henderson County

Demonstrates how mountain communities can capitalize on outdoor and institutional assets to grow visitation while protecting local character.



Recommendations & Next Steps



Henderson County Overview



Where You Are Now

The following shows Henderson County's largest or most visited asset within each tourism pillar and the share of long -distance visitors to each.



N/A



Home2 Suites
Opened 2024



Jackson Park
342K Annual Visits
(4% Long-Distance)



Blue Ridge CC
Unable to Geofence
Visitation



NC Apple Fest
107K Total Visits
(15% Long-Distance)



Sky Top Orchard
114k Annual Visits
(26% Long Distance)



**DuPont State
Recreation Forest**
262K Annual Visits
(43% Long-Distance)



Flat Rock Playhouse
44K* Annual Visits
(22% Long-Distance)



Hendersonville Downtown
2.2M Annual Visits
(16% Long-Distance)



Sierra Nevada Brewing Co.
163K Annual Visits
(52% Long-Distance)

**Flat Rock Playhouse website estimates 100,000+ **Adjacent to Henderson County*

Source: Placer.ai

Direct Drivers in Henderson County

The following highlights five of the Pillars of Place and their corresponding focus areas that both have in the past and will in the future best serve as **direct drivers** of tourism for Henderson County, to give an idea of how Henderson County can best improve its tourism potential for its existing assets.

					
Pillar	Conventions and Conferences	Outdoor Recreation & Natural	Sports	Hotels & Hospitality	Festivals & Events
Primary Asset/ Direct Driver	Blue Ridge Community College	DuPont State Recreation Forest Environment	Henderson County Sports Complex	New Downtown Hendersonville Development	New Dedicated Festival & Event Area
Key Gaps	<ul style="list-style-type: none"> Lack of meeting / conference space Lack of walkable downtown hotels 	<ul style="list-style-type: none"> Highway Signage and Digital Wayfinding Marketing and reemphasizing visitation now that parks are re-opened 	<ul style="list-style-type: none"> Tournament Programming Completing the complex 	<ul style="list-style-type: none"> Downtown full-service hotel Integrated meeting/conference space 	<ul style="list-style-type: none"> Adjacent downtown space dedicated for festivals, events, outdoor music shows, gatherings Hub for events and festivals
Priority Level For Addressing Key Gaps	<p>MEDIUM</p> <p><i>Strong and established tourism driver; Decide to pursue depending on the performance of Hotel with Meeting Space</i></p>	<p>MEDIUM</p> <p><i>Capitalize on capturing visitation after after parks have re-opened.</i></p>	<p>HIGH</p> <p><i>There should be a push to complete the project. Measure competition from other complexes.</i></p>	<p>HIGH</p> <p><i>Lack of meeting/conference space and downtown hotel. Would capture more meetings/events and increase downtown visitation</i></p>	<p>MEDIUM</p> <p><i>Current festivals and events are strong drivers of visitation and quality of life, but there is an opportunity to enhance with a dedicated outdoor space</i></p>

Product Investment Recommendation



Strategic Recommendations – Three Priority Assets

Sports Tourism Infrastructure

- **Market Rationale:** Youth and amateur sports tourism generates strong overnight visitation with shoulder-season demand.
- **Key Components:** Tournament programming strategy, third-party management model, season utilization patterns, commission indoor facility feasibility study
- **Next Steps:** Complete outdoor complex construction, launch tournament marketing, commission comprehensive indoor sports feasibility study
- **TDA Role:** Destination marketing, tournament attraction support, economic impact tracking.

Conference & Meeting Space

- **Market Rationale:** Henderson County lacks mid-sized meeting and conference facilities for corporate retreats, association meetings, and regional conferences.
- **Key Components:** 15,000 to 30,000 square feet, divisible ballroom and breakout rooms, public-private partnership structure
- **Next Steps:** Commission comprehensive feasibility study
- **TDA Role:** Market intelligence provider, partnership coordination.

Outdoor Festival & Event Space

- **Market Rational:** Henderson County's current festival and event infrastructure could use a permanent venue to support existing events and attract regional programming.
- **Key Components:** Permanent stage/pavilion with fixed seats and lawn capacity, with a 2,000 to 3,000 total capacity,
- **Next Steps:** Feasibility study, site selection and evaluation, programming and funding strategy development
- **TDA Role:** Feasibility study coordinator, stakeholder convener, destination marketing support, market intelligence provider.

ROI Models for Three Priority Assets



30-Year Impact – Youth Sports Base/Day Case



Spending

Total \$164 Million

Direct \$117 Million
Indirect \$47 Million



Earnings/Payroll

\$26 Million

\$19 Million
\$7 Million



FTE/Jobs

19

17
2



County Tax Impact

\$3 Million

Sales \$2 M
Hotel \$1 M

*Base case is estimated impact of current project

**Project feasibility was not conducted at this stage by Hunden. ROI reflects the economic impact shown above. Detailed financial modeling, including operating costs, should be completed in future feasibility work as needed.

30-Year Impact: Youth Sports Enhanced/Night Case



Spending

Total \$197 Million

Direct \$140 Million
Indirect \$57 Million



Earnings/Payroll

\$32 Million

\$23 Million
\$8 Million



FTE/Jobs

23

20
3



County Tax Impact

\$4 Million

Sales \$3 M
Hotel \$1 M

*Enhanced Case is base case with the incremental return of adding lights and supplementary facilities like coach/scout/ref rooms, bathrooms, etc.

**Project feasibility was not conducted at this stage by Hunden. ROI reflects the economic impact shown above. Detailed financial modeling, including operating costs, should be completed in future feasibility work as needed.

30-Year Impact: Conference and Meeting Space



Spending

Total \$656 Million

Direct \$469 Million
Indirect \$187 Million



Earnings/Payroll

\$111 Million

\$82 Million
\$29 Million



FTE/Jobs

66

57
9



County Tax Impact

\$17 Million

Sales \$9 M
Hotel \$8 M

**Project feasibility was not conducted at this stage by Hunden. ROI reflects the economic impact shown above. Detailed financial modeling, including operating costs, should be completed in future feasibility work as needed.



Project Return on Investment – Festival/Event Space



Spending

Total \$57 Million

Direct \$44 Million
Indirect \$13 Million



Earnings/Payroll

\$7 Million

\$6 Million
\$2 Million



FTE/Jobs

4

4
0



County Tax Impact

\$0.42 Million

Sales \$0.14 M
Hotel \$0.18 M

**Project feasibility was not conducted at this stage by Hunden. ROI reflects the economic impact shown above. Detailed financial modeling, including operating costs, should be completed in future feasibility work as needed.



ROI Model and Impact Projection Comparisons

The following compares the projected 30-year economic impact across the three priority asset scenarios. Meeting space generates the highest total spending and tax impact, while the Henderson County Sports Complex provides near-term activation with a lower investment threshold. Festival and event space contributes more modest direct returns but supports broader destination programming and seasonal activation goals. These projections represent high-level destination impact estimates; detailed pro forma analysis would be conducted as part of individual feasibility studies.

Scenario	Spending – 30 Years	Earnings/Payroll – 30 Years	FTE/Jobs – 30 Years	County Level Tax Impact – 30 Years
Henderson County Sports Complex - Base	\$164 Million	\$26 Million	19	\$3 Million
Henderson County Sports Complex – With Lights & Amenities	\$197 Million	\$32 Million	23	\$4 Million
Conference and Meeting Space	\$656 Million	\$111 Million	66	\$17 Million
Festival/Event Space	\$57 Million	\$7 Million	4	\$0.42 Million

**Project feasibility was not conducted at this stage by Hunden. ROI reflects the economic impact shown above. Detailed financial modeling, including operating costs, should be completed in future feasibility work as needed.

Destination Development Business Plan



Destination Development Business Plan

SHORT TERM

2026-2027

Henderson County Sports Complex: Complete construction, launch tournament marketing, activate facility operations.

Monitor Performance and Economic Impact: Create plan to track KPIs to understand net new impact from sports complex.

Feasibility Study for Conference/Meeting Space: Commission feasibility study, explore city partnership opportunities, issue RFP/RFP if feasible.

MEDIUM TERM

2028-2030

Indoor Sports Facility: Commission feasibility study, assess public-private partnership options, visitor and resident sentiments towards facility.

Festival/Event Venue: Commission feasibility study, site evaluation and selection, program strategy development.

LONG TERM

2031+

Asset Operations & Optimization: Any priority facilities operational, programming maturity and refinement, performance optimization.

Complementary Development: Additional hotel development responding to demand, continued investment and programming.

Annual Review and Adaptation: Ongoing monitoring and course correction, responding to market evolution.

*TDA funds alone are insufficient to fully fund these projects but can serve as contributing factors and fund initiatives like feasibility studies and help secure project success.

Destination Development Business Plan

Critical Success Factors



Organizational Capacity: The TDA's role in plan implementation is as a marketing partner, destination convener, and event organizer, not as a facility developer or operator. Successful execution will require coordination across County government, municipal partners, and the private sector, and may require incremental staffing to support plan stewardship.



Stakeholder Alignment: Each priority asset involves multiple parties with distinct roles and funding responsibilities. Early alignment between the TDA, Henderson County municipalities, County government, and private developers on decision-making authority is essential.



Community Benefit: Ensuring project reinvestments are communicated and demonstrate continued benefit to residents and visitors alike will be important.



Momentum Maintenance: Early wins from the sports complex build credibility and generate data that strengthens the case for subsequent investments. Demonstrating measurable visitor impact creates political and financial momentum for larger projects.

Concept to Reality

Step 1

Destination
Development
Business Plan
Delivered

Step 2

TDA presents
findings and
recommendati
ons to key
stakeholders
and builds
consensus on
priority assets

Step 3

TDA supports or
commissions
feasibility studies
on priority assets
and participates in
steering
committees

Step 4

Assets advance
through
development,
TDA develops
marketing and
activation
strategies to
maximize visitor
impact

Goal

Priority assets
operational,
TDA marketing
drives
measurable
increases in
visitor spending,
room nights, and
occupancy tax
revenue

Weekly Timeline



Tasks 1-7

- TASK 1 — Kickoff, Project Management & Discovery
- TASK 2 — Stakeholder Engagement
- TASK 3 — Henderson County Destination Overview
- TASK 4 — Resident Sentiment Research
- TASK 5 — Hunden Pillars of Place: Destination Product & Gap Analysis
- TASK 6 — Comparable & Competitive Destination Case Studies & Best Practices
- TASK 7 — Product Investment Recommendations

Tasks 8-10

- TASK 8 — ROI Models for Three Priority Assets
- TASK 9 — Organizational Positioning & Marketing Integration
- TASK 10 — Creation of Final Destination Development Business Plan

Final Edits

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Appendix



Event Management vs. Promotion: Rationale

Hunden has identified the following key takeaways based on industry knowledge and best practices in tourism and destination development:

Broader Economic Impact

- Event execution often delivers short-term, localized benefits. Marketing and tourism generation drives sustained, wide-reaching visitor spending across hotels, restaurants, attractions, and retail — benefiting the broader economy.

Amplifying Partner & Stakeholder Success

- Shifting focus allows local partners (venues, event planners, organizations) to own event execution. Henderson County can support through promotion, co-branding, and audience generation, rather than stretching internal resources to manage logistics. This will result in more scalable partnerships and less operational strain on the team.

Building Long-Term Destination Brand Awareness

- Tourism marketing shapes perceptions of the destination year-round. Event execution is transactional; marketing builds destination loyalty, inspires repeat visits, and elevates Henderson County's profile in competitive markets.

Flexibility & Risk Reduction

- Events carry higher risk (weather, attendance, health concerns, economic shifts). Marketing campaigns are more adaptable, measurable, and can pivot based on conditions — particularly valuable post-COVID when traveler behavior remains fluid.

Increased ROI Potential

- Marketing efforts (digital campaigns, influencer partnerships, media buys) have defined metrics (impressions, conversions, bookings). Events often have harder-to-measure ROI and higher upfront costs (staffing, permits, production).

Strengthening Off-Season & Midweek Tourism

- Events usually target peak times, but focused marketing can fill gaps in midweek business travel, off-season leisure visitation, as well as promotion of niche markets.

What it Means:

Trends in the meetings and events industry indicate important factors in the decision-making process of choosing a meeting or event site. Consideration of these factors will help any proposed conference center development's competitiveness among other local and regional facilities.



EVENT COST

Rising transportation, catering, and services costs are driving venue selection.



EVENT INVESTMENT

CVBs and DMOs can provide financing incentives for convention centers to ensure both parties optimize ROI.



SUSTAINABILITY

To maximize operational efficiency, venues will need to incorporate with sustainable features in mind that reduce long-term expenses.



FLEXIBLE SPACE

Meeting planners are interested in venues that offer high-quality flexible spaces.



EVENT DESIGN

Venues should leverage modular design that accommodates engaging, multi-use spaces.



INFRASTRUCTURE INVESTMENT

Increased space utilization allows venues to be more flexible and profitable. Vertical expansion is becoming a popular solution.

What it Means (Con'td.):

Trends in the meetings and events industry indicate important factors in the decision-making process of choosing a meeting or event site. Consideration of these factors will help any proposed conference center development's competitiveness among other local and regional facilities.



SEAMLESS SERVICE

Events are better facilitated when the event planning experience is seamless.



CONSOLIDATION

Convention centers and DMOs will need to work in conjunction to have fewer points of contact for event planners.



INCENTIVES

DMOs and CVBs should help convention centers offer financial incentives to attract more events.



TECHNOLOGY

Demand for venues that can accommodate various technological needs is rising.



BANDWIDTH

Venues should prioritize increasing their bandwidth capabilities to allow for increased connectivity.



ENGAGEMENT

Venues will need to incorporate collaborative spaces that can accommodate immersive experiences within building design.

What it Means (Con'td.):

Trends in the meetings and events industry indicate important factors in the decision-making process of choosing a meeting or event site. Consideration of these factors will help any proposed conference center development's competitiveness among other local and regional facilities.



HEADQUARTERS HOTELS

Convention centers with headquarters hotels are more attractive to meeting planners.



PARTNERSHIPS

Convention centers should form lasting relationships with local hotels.



EXPANSION OPPORTUNITIES

Cities should explore opportunities to connect existing hotels to convention centers or develop a headquarters hotel if necessary.



WALKABLE AMENITIES

Restaurants and attractions nearby make a destination more desirable.



CAMPUS STYLES

New conference centers should be designed with a campus style in mind to maximize economic impact.



STRATEGIC PLANNING

Cities can create strategic layouts in collaboration with local retailers to ensure amenities synergize with the conference center.