





What strategies for sustainable employment and urban development planning?

Case study: New Orleans



Preface

With 350,000 inhabitants, New Orleans is the most populous city in the American state of Louisiana. Cultural activity is an historical characteristic of this city whose economy relies heavily on tourism (primarily American) but also on industry (energy and maritime sectors, manufacturing).

The city has endured three consecutive blows in recent years. The hurricane Katrina tragedy in 2005 cut the city's population in half. The ensuing economic downturn seriously weakened the local economy. Lastly, the oil spill caused by the explosion of the Deepwater Horizon offshore drilling rig 80 km from the Louisiana coastline in April 2010 further tarnished the city's image internationally.

In the aftermath of these events, New Orleans now faces a three-fold challenge: reconstruct its identity, regrow its population and rebuild its economy. To meet these challenges, an ambitious cultural policy called "Louisiana: Where Culture Means Business" was launched in 2003 by Mitch Landrieu, former Lieutenant Governor of Louisiana and new Mayor of New Orleans. The policy outlines support, predominantly in the form of fiscal incentives, for four sectors: film and audiovisual, videogames, music and the art market. This strategy for cultural development has a dual objective: create businesses/jobs and restore social cohesion.

Strengths/Weaknesses/Opportunities/Threats in New Orleans

	Strengths	Weaknesses
	Strong cultural legacy (the city is a cradle of festivals, celebrations and jazz) International acclaim Cost of living below the national average Quality of life and environment Highly attractive fiscal incentives for cultural industries	 Under-qualified population Social precarity Security concerns: the highest crime rate per capita in the United States, 10 times higher than national average Economic dependence on oil industry revenues Growth without job creation
•	Affordable labour	
	Opportunities	Threats
	City policies committed to cultural economy development Inhabitants proud to belong to their city, and post-Katrina solidarity Arrival of new young, qualified and entrepreneurial-minded inhabitants	 Competition from other American and international cities in terms of fiscal policy and salaries in cultural industries

New Orleans' Identity Card A multicultural city: through the Demographic impact of the hurricane, on top of the physical, moral and years, New Orleans has been inhabited cultural after-effects the French, Spanish, African slaves and European immigrants and today has one of the largest African-American populations in the United States (61%). Hurricane Katrina in August 2005 sparked a demographic haemorrhage that disintegrated Population the city: Katrina cut the population by half with many inhabitants emigrating to Baton Rouge, Atlanta or Houston. It was a social trauma for a city where over 70% of inhabitants had been there for generations. In 2010, the city's population had rebounded to 80% of what it was in 2005. Inhabitants have returned but also new residents have moved in, many of which are young, qualified and committed to social development. 907 km² Area Study parameter: City of New Orleans **Parameters** New Orleans is one of the poorest and most unsafe cities in the United States GDP per capita is €27,452 (behind Detroit). 23% of the population lives below the poverty line versus a national average of 11%. Highest crime rate in the United States, surpassing New York, Los Angeles or Chicago. This is not a new phenomenon but it has worsened since 2005. A shrinking economy but one working to regain pre-Katrina employment rate The unemployment rate is below the national average (8.2% in June 2010 versus 9.6% nationwide) but this is mainly due to the 2005 exodus. The city has 519,600 jobs (as of April 2010). 93,800 jobs have been created in five years. Total employment is now only 14% lower than pre-Katrina level). These are the employment sectors still suffering from Katrina: gaming industry (65% lower than pre-Katrina level), arts and leisure (25% lower), financial services (25% lower), industry and transportation (23% lower). Employment in these sectors has rebounded: education (up 5%), technical services (up 1%), and construction (back on par). Job loss due to the 2008 crisis remains marginal (-1% state-wide versus -4% nationally). New business creation rate above the national average. Competitive economy thanks to low salaries but relatively underproductive In 2007, the average annual salary in New Orleans (\$ 46,714) was half that of San Francisco **Economic** (\$97,530). While salaries remain at the lower end of the American scale, they are rising (+14% in five dynamic years) and are back on par with the national average for the first time since the mid-1980s. Productivity has stagnated over the last 30 years (+6% versus +51% nationally) Tourism, oil/gas and maritime sector: 3 engines operating in slow motion The city's economy depends on tourism. This sector is the 3rd largest employer in New Orleans (behind public administration and trade), accounting for 1 in 6 jobs. It generates 10% of salaries and 40% of the city's tax revenues. Tourism had been growing exponentially since the 1990s but came to a brutal halt in 2005. It has begun growing again in recent years. Most jobs in this sector are filled by unqualified workers, and salaries are very low (\$32,618), often 50% lower than the national average. Energy and the maritime/fishing sectors have been losing jobs since the 1980s. Reasons include Asian competition, technical advances in naval construction, oil crises and the new concentration of the energy industry in Houston. Ten years ago, oil/gas accounted for 50% of Louisiana's GDP per capita versus only 20% today. The oil and gas industry is only the 5th largest employer in Louisiana. Katrina had no major impact on these sectors but the 2010 oil spill and natural

risks could accelerate the decline. Salaries in the oil/gas sectors remain attractive and the highest

in the urban area (\$102,000).

A tourist destination that mainly attracts Americans The city is known for its vibrant ambiance, musical scene and nightlife. The music culture, historical concentration of artists, cuisine, architectural legacy, festive feel (Mardi Gras and other festivals) and the climate make this an attractive destination for pleasure and business tourists. The city remains one of the Top 10 American destinations. The city had 7.5 million visitors in 2008, only 20% lower than pre-Katrina levels (10 million in 2004 versus 3.7 million in 2006). International tourists only accounted for 550,000 overnight stays but that number is rising. Louis Armstrong Airport recently resumed international flights to Mexico and Canada (2009-2010). Key tourism Tourism has endured three blows: Katrina in 2005, the 2008 financial crisis and the 2010 figures oil spill The sector employed 85,000 workers in 2004 versus 70,000 today. 60% of French Quarter tourists returned one year after Katrina in 2006. The city's hospitality industry is now close to 80% The 2008 crisis hurt the sector: 100,000 fewer tourists in 2009 than 2008. Meetings and conventions, which previously drew 50,000 visitors yearly, have not returned to pre-crisis levels. The number of tourists dropped again by 16% in 2010, the year of the oil spill. While the city felt no direct effects from the spill, the public perception of the region has changed. Well preserved cultural legacy, unique in the United States City of Jazz: New Orleans has attracted and been home to musicians for over one-hundred years. It hosts 100 festivals yearly, most of which are tied to music. 25 museums: New Orleans Museum of Art, Ogden Museum of Southern Art, City Museum and Research Centre for the Arts, Confederate Memorial Hall, Contemporary Art Center, etc. Well preserved but endangered architectural legacy: French Quarter, colonial houses, wrought-iron balconies, Cities of the Dead, the in-vogue and artsy Warehouse District, etc. Cuisine: seafood and Creole/Cajun/French fusion cuisne, etc. New Orleans cuisine is known for having Cultural the "best food in the United States." sector Cultural renaissance in Louisiana The cultural economy was the 2nd largest employer in Louisiana in 2005 with 144,000 jobs, or 7.6% of total Louisiana employment, outperforming the oil and tourism industry. New Orleans is the hub of cultural employment. The film industry has grown significantly in Louisiana. It grew 22% between 2002 and 2007 thanks to a proactive public policy. Emergence of knowledge-intensive economic activity in last five years: job growth in higher learning, legal services, insurance, etc. Public education system has benefited from post-Katrina rebuilding efforts Prior to Katrina, 64% of schools were below the national average for academic achievement. City reconstruction efforts have improved schools. Parent satisfaction ratings doubled in 8 years and academic achievement is on the rise (new teachers, freedom to choose schools, federal aid, etc.). Chater schools - hybrid private-public institutions funded by the state and run by parents, teachers and private organisations - have been being created since 2005. In 2010, the public school system received \$1.8 billion dollars in aid to rebuild schools. Education Fewer college graduates than national average Only 23% of inhabitants have college degrees. The trend remained stable between 2000 and 2008 but remains below the national average of 28% (and rising). Thanks its quality of life and affordable housing, in 2010 the city was home to 80,000 students

enrolled in 17 colleges and universities. Low salaries, however, result in brain drain. 3 of the city's largest universities offer programmes in music and the music industry.

New Orleans city policy has historically promoted an image rooted in culture and jazz

Jazz: a secular culture and art de vivre, and fabric of a multicultural social community

- For over a century, the city's quality of life and art de vivre (affordable housing, climate, history, etc.) have attracted artists, musicians and jazz lovers from all over the world.
- American music was **born in New Orleans**. **Jazz** developed greatly here in the 1910-1920s before moving to Chicago and Harlem. Louis Armstrong and Sydney Bechet left their mark on the city. **Music education is passed from generation to generation and ties communities together**.
- A cradle of jazz and blues, and other musical genres (Cadian, Zydeco), the city had around 120 music clubs in 2006. The diversity of musical scenes, studios, marching bands, neighbourhoods and parishes as well as international festivals all attract musicians.
- Higher education opportunities attest to the city's jazz specialty and offer training covering the entire cultural chain, from creation to business and marketing:
 - The **Music Business major at Loyola University** is the first academic degree in the United States to combine music and business into a single programme.
 - The **Thelonius Monk Institute of Jazz Performance** created after Katrina at Loyola University is a hotbed of young talented musicians from underprivileged neighbourhoods.
 - The New Orleans Center for the Creative Arts was created in 1973 by artists, professors, entrepreneurs and activists. It has 100 students and offers free tuition to Louisiana residents. It prepares students for music conservatories and university music programmes.
 - The Jazz Programme at New Orleans University is chaired by renowned jazz musician Irvin Mayfield.
- The arrival of the film industry in the 2000s has made the musical scene even more vibrant (music videos, documentaries, T.V. programmes).

Outdoor music and festivals: the art of "livening things up," and federating artists and and art lovers

- The city is renowned for its street orchestras (Bourbon Street, etc.) and school marching bands. Historically, New Orleans jazz was played outdoors before setting up shop in cabarets.
- Today, New Orleans organises more festivals than any city in the world with most tied to jazz and Mardi Gras:
 - Some 100 events are held every year in various neighbourhoods: the New Orleans Jazz & Heritage
 Festival is the 2nd largest festival in the United States (estimated attendance of 700,000), the
 French Quarter Festival (jazz), Satchmo Summerfest (local and international jazz), Essence Music
 Festival.
 - Another festive and musical tradition is Mardi Gras, a 12-day event attended by some 700,000 people, more than half of which are from the metropolitan area. The whole city comes alive and is part the event. Loyal to tradition, 90.2% of participants are second-timers. Every \$1 invested by the city (police, sanitation, medical services) generates \$4.48 in revenue (transportation, hospitality, food-services). According to a study by Tulane University, Mardi Gras has a positive effect on year-round tourism statistics.
- Festivals stimulate the local economy (technicians, scenery) and tourism. However, **increases in the number of participants do not necessarily mean higher profits for businesses**:
 - Founded in the 1970s, The "New Orleans Jazz & Heritage Festival" is produced by the private sector (Festival Productions Inc.) and has been sponsored by the oil company Royal Dutch Shell since 2006. It reached an all-time attendance record of 650,000 in 2001 but was down to 375,000 in 2010.
 - The economic impact of the French Quarter Festival, an annual music festival, dropped from 2008 to 2009. Attendance has been on the rise but people are spending less on site.
- This combination of culture, music, festivals, architectural heritage, cuisine and the unique mentality of inhabitants has made the city attractive, drawing tourists since the 1980s. Prior to Katrina, the city hosted 20 times it population every year (10 million tourists in 2004).

New Orleans has endured a series of crises and natural disasters that destabilised the territory and undermined growth

The passage of Katrina in 2005 shattered the social and cultural community

- Hurricane Katrina flooded 80% of the city and claimed the lives of 1,000 residents. The population was evacuated and one-fourth never returned.
 - Before Hurricane Katrina, the city had 455,000 inhabitants, two-thirds of which were African-American.
 - The hurricane demolished an area seven times the size of Manhattan. 200,000 homes were destroyed. In 2006, or one year after Katrina, the population had dropped to 208,500. The disaster was a horrendous trauma for a city where more than 70% of residents had been there for generations.
 - In 2009, four years after the hurricane, the city is repopulating: 354,850 inhabitants, or 80% of the 2005 population.
- Poughly 3,000 musicians worked in the city prior to Katrina. In 2006, the city only had 1,000. The housing shortage and rent inflation limited their return. Numerous artists and musicians including famous jazz musicians Branford and Ellis Marsalis and Harry Conninck Jr. have taken a proactive role in revitalising this cultural tradition and restoring social cohesion through music.
 - Thanks to international donations, a "Musicians' Village" was built around the "Ellis Marsalis Music Center" to encourage musicians to return and to help them become homeowners.

The 2010 oil spill impacted the city's image and industrial employment

- The State is home to no less than 18 refineries, accounting for 15% of refining plants in the United States. Employment and revenue in the state of Louisiana depend heavily on the oil economy. The loss of 24,000 jobs due to the oil spill hurt the State, which was already one of the poorest in the United States.
 - The oil industry remains a decisive sector in terms of revenue. According to some estimates, the ripple effect of this sector generates indirect and direct revenue totalling \$65 billion yearly. 20% of the revenues of the state of Louisiana come from the oil industry.
 - The oil spill damaged New Orleans' image: in June 2010, New Orleans mayor and former Lieutenant Governor of Louisiana Mitch Landrieu said that the oil spill had had a direct financial impact and that his city needed \$75 million for international promotion and to restore its image.

New Orleans has designed a strategy rooted in culture and social cohesion to rebuild itself and restore the attractiveness of its territory

Speech by New Orleans mayor and former Lieutenant Governor of Louisiana Mitch Landrieu at the 2009 Avignon Forum:

"New Orleans residents were able to survive and get back on their feet thanks to their deep attachment to their land and culture. The soul of the city, its culture, is what brought inhabitants back."

"Although many were homeless and jobless, they fought to keep their culture alive. They continued pouring into **jazz festivals**. It's as if all the inhabitants refuse to let their culture go, this culture that forms the fabric of this state and gives reason to hope. The New Orleans Superdome was completely destroyed. It was immediately rebuilt so the football could get back to playing."

A strategy to revive the cultural economy was launched in 2003

Culture is at the core of Mitch Landrieu's political agenda. In 2003, he initiated the *Cultural Economy Initiative*, an ambitious strategy intended to galvanise cultural production. **Its slogan is, "In Louisiana, culture means business."**

- This strategy is based on several components:
 - Broad definition of culture (design, entertainment, film, digital media, music, performing arts, literature and the humanities, visual and culinary arts, conservation).
 - Need to diversify the State's sources of revenue: tourism, oil and the maritime sector are not enough. The goal is to lay the groundwork for new opportunities in a cultural economy that "produces" quality goods and services.
 - Recognition of the economic importance of culture. Culture is an economy in and of itself, and financial support for cultural segments generates "returns on investments" for the territory in terms of employment, new business creation and revenue.
 - Support for all cultural actors: artists and artisans, cultural actors, art galleries and museums.
 - The strategy takes the entire value chain of the cultural economy into account: origination of creative goods/services, production, support services, distribution and markets.
- Previtalising the cultural landscape should attract **qualified cultural artist/creators**, new inhabitants and businesses, and create sustainable employment and increase salaries.
- The World Cultural Economic Forum (WCEF) launched in 2008 by the State of Louisiana aims to give international visibility to the successes of Louisiana's cultural strategy and to fuel policy discussions.

Bolster creativity and design to attract designers and artists

- Provide a good quality of life to designers and artists: the Louisiana Cultural Economy Foundation, a non-profit private foundation, was created in 2005 as part of the Cultural Economy Initiative. It aims to ensure the right context for creative output. It promotes Public/Private Partnerships that support artists and cultural organisations, particularly in matters relating to healthcare and quality of life of workers in the cultural industry. The Foundation raised \$1.1 million from public and private sources, which it distributed to artists, organisations and cultural enterprises. The Foundation is presently in the process of finalising its strategic plan to support Louisiana's cultural industry and to promote business creation and innovation in the sector.
- Two initiatives designed pre-Katrina aim to give artists a place in the economy:
 - The Arts Business programme of the Arts Council of New Orleans has been offering management training and advice to artists, creative organisations and arts enterprises (marketing, funding, technology, free legal advice, health insurance, etc.) since 1991. This program has been recognised nationally as a model of business incubation.
 - The Louisiana ArtWorks Complex in New Orleans opened in 2005 aims to help recent college graduates from art programs find jobs and to keep them in the area. This creative centre of applied and visual arts (glass, metal, ceramics, etc.) is open to the public (café and store). It hosts professionals from the fields of management and infrastructure (foundry, etc.) and provides art classes to underprivileged youth. The Complex receives public funding and private support (Ford Foundation, Warhol Foundation, National Endowment for the Arts, Louisiana Division, and others).

Fiscal incentives designed to boost employment in four segments of the cultural sector

- **Louisiana has designed very attractive tax credit system** inspired by Quebec to fuel business and job creation in four areas of cultural production: Film, Music, Video Games, Art Objects.
 - The goal is to gain a competitive advantage over other American cities by offering attractive incentives to cultural industries with high value added able to draw creative entrepreneurs to New Orleans over the long-term.
- Tax credit on film investments in "Hollywood South" since 2002:
 - The system is managed by the Louisiana Office of Entertainment Industry Development Office and is intended to support the city's architectural heritage and culture. It addresses in particular the filming and audiovisual segments.
 - **Eligibility**: the project must spend over \$300,000 in Louisiana and be one of the following genres: feature film, music video, television series, television movie, or promotional film (excluding television coverage of news or athletic events).

- **Financial incentives**: a fully transferable 25% tax credit with no cap on investments in motion picture production in Louisiana: pre-production, production and post-production costs, payroll costs, transportation, payroll costs, technical teams, etc.
- Anyone can apply for this Louisiana credit after a project is completed. In fact, most investors are not fiscally domiciled in Louisiana (based in Los Angeles or New York).
- Support services: the New Orleans Office of Film and Video (OFV) serves as a liaison between
 production teams from places like Los Angeles and qualified local teams (technical, production, postproduction, extras, unions, etc.), offers logistical assistance (hotels, filming permits, tax advice) and
 informs locals about short or long training programmes in the sector.
- **Results**: Louisiana has become the 3rd largest film production centre in the United States behind Hollywood and New York. 135 films (including Ray, Déjà Vu, Curious Case of Benjamin Button, etc.) and television programmes between 2002 and 2007 were eligible for the tax credit. The Louisiana Film & Television Studios opened in 2006.
- Return on investment: Prior to the tax credit system, the sales figure of this sector totalled \$10 million and provided a few hundred jobs. In 2008, \$105.5 million in tax credits spawned \$763 million in ripple-effects on the economy, which accounts to a return on investment of \$6.64 for every \$1.
- Employment and salaries: 7,000 jobs have been created in the film industry. Between 2001 and 2007, the industry employment rate rose 23% yearly (according to the Office of Labor Statistics), which represents the fastest growth in the country. In 2007, the industry directly employed 3,310 people and another 2,920 indirectly. Total salaries totalled \$204 million. From 2001 to 2007, the average salary of workers in this industry rose 8.2% per year, but still remains one of the lowest in New Orleans (\$31,255 per year versus state-wide average of \$46,714).

Approval of the "Digital Interactive Media Act" in 2005:

- Its goal is to stimulate the growth of the video game industry through tax credits and to capitalise on these technologies to build software applications for other sectors (applications for oil/gas prospecting, educational supports in the field of urban planning, and more).
- Several eligibility criteria (commercial intent, online diffusion, must combine sound/text/images/3D animations, etc.)
- Impact on employment and salaries: In 2007, the digital media industry employed 4,381 people, representing a 9% yearly growth rate since 2001 versus .4% nationwide. Salaries are higher than in other cultural jobs and more immune to seasonal impacts and the instability of other segments of the entertainment industry.
- Return on investment: the system has contributed \$2.1 million to the state's economy (rate of return of \$8.7 on every \$ 1).
- Washington (Microsoft) and California (Silicon Valley) remain the largest players in the video game industry.

"Broadway South" tax credit system for sound recordings in place since 2007:

- Supports the city's secular music tradition (jazz, blues, Cajun music).
- 25% of investments in musical and theatrical productions eligible for tax credit system; aims to stimulate audio production and the recording industry (CD, digital downloads, soundtracks).
- In addition, Louisiana created the Recording Academy to award Grammys for Cajun and Zydeco music (2008) in order to raise the visibility of the local musical industry.
- Impact on employment: most employees have part-time or short-term contracts, which is similar to the audiovisual sector.
- The recording industry is based in California and New York, which account for 29% and 18% of industry employment respectively. The same applies to recordings by musical groups and artists. Louisiana ranks 33rd and 32nd, respectively, in the nation in terms of the number of jobs in the recording industry.

21 "Cultural Districts" were designated in 2007 to stimulate the art market:

- **Objective:** increase artistic employment and stimulate the art market by drawing customers and tourists into the historic districts abandoned after Katrina.
- Original artworks not intended for mass reproduction, crafts, plastic arts and visual art sold in these
 districts are exempt from taxation.
- The impact of this state-led initiative will be formally assessed in 2011.

New Orleans is firmly committed to developing a knowledge economy

Early signs that the city's economic and social fabric is changing

- The rebirth of the city was made possible by civil society, volunteers from all over the country who came to New Orleans out of solidarity or passion for the city, initiatives and philanthropy on the part of artists (Ellis Marsalis, Brad Pitt and others), and Churches:
 - Charity concerts and sales of jazz CDs across the country greatly increased the visibility of the local artistic scene.
 - The number of non-profit associations for the arts and culture is three times higher than the national average and continues to rise (86 local associations in 2007 yersus 81 in 2004).
 - Citizen/community involvement has risen since 2005 (attendance rate at public meetings).
- The influx of young, white and qualified newcomers has transformed the city's social and cultural makeup: 3,000 young college graduates committed to social action have moved to New Orleans. They work in education, humanitarian aid, maritime or environmental law, film or new technologies.
- For the last five years, employment in higher education has been higher than in naval construction, general construction or engineering.
- The school system has been reformed and student enrolment is on the rise. In 2010, the number of applicants to Tulane University rivals the top American universities.
- A symbol of the city's rebirth 5 years after Katrina: the Saints football team won the American football championships (Super Bowl 44) in February 2010 at the Superdome (the stadium where thousands of hurricane Katrina victims took refuge). The event broke all previous attendance records and received historical coverage.

An ongoing commitment by the new City Administration to support the cultural economy

- Mitch Landrieu was elected mayor in April 2010. Today, the Office of the Mayor has appointed a fourperson team on the cultural economy to continue fostering dialogue between the commercial and noncommercial sectors of culture.
- The Art Council of New Orleans offers scholarships, organises contests, offers training (Arts Business Program), oversees the cultural employment market (job opportunities, legal assistance), diffuses the cultural agenda and voices artists' needs to the city's decision-makers.
- The new mayor is committed to pursuing the cultural objectives outlined in the strategy he drew up for Louisiana:
 - Promote the creation and sustainability of authentic local culture
 - Support production, distribution and markets for local cultural goods.
- The Landrieu administration aims to achieve these objectives by 2010:
 - Coordinate public-private partnerships in the cultural and tourism industries in order to promote the city,
 - Eliminate red-tape: film production insurance costs, noise limits, issuance of permits, etc.
 - Promote the integration and mobility of artists and designers in cultural industries through publicprivate partnerships,
 - Modernise cultural infrastructure,
 - Integrate creative teams into housing rehabilitation projects,
 - Design a brand/marketing image for New Orleans culture,
 - Ensure at least one art class in every public school to stimulate student creativity and academic achievement. Funding sources for this initiative have not yet been defined.

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Interview

Scott Hutcheson, Advisor to the Mayor for Cultural Economy, Office of Mayor Mitch Landrieu, City of New Orleans

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