2013 NEW ORLEANS CULTURAL ECONOMY SNAPSHOT

The Mayor's Office of Cultural Economy
CITY OF NEW ORLEANS
Mitchell J. Landrieu

May 2014

Dear Friends and Colleagues:

I am pleased to present the 2013 New Orleans Cultural Economy Snapshot, the fourth edition of the groundbreaking report created at the beginning of my term as Mayor in 2010. My Administration has offered this unique, comprehensive annual review of our city's cultural economy not only to document the real contributions of the creative community to our economy, but also to provide them with the information they need to get funding, create programming, start a business, and much more. This report outlines the cultural business and non-profit landscape of New Orleans extensively to achieve that goal.

As I begin my second term as Mayor, the cultural economy is more important than ever. The cultural sector has 34,200 jobs, an increase of 14% since 2010. New Orleans' cultural businesses have added jobs each and every year, and jobs have now exceeded the 2004 high. The city hosted 60 total feature film and television tax credit projects in 2013, a 62% increase from 2010. Musicians in the city played 29,000 gigs in 2013 at clubs, theatres, or at many of the city's 136 annual festivals. This active cultural economy injects millions into our economy, as well as an invaluable contribution to our quality of life.

The City will continue to craft policies and streamline processes that benefit cultural businesses, organizations, and individuals over the next 4 years. There also is no doubt that cultural workers, business owners, producers, and traditional cultural bearers will persist in having a strong and indelible impact on our economy and our lives. I invite you to utilize this report so that we can maximize this impact and spread the word of the strength of our city's diverse cultural economy. Thank you to all who contribute data to this report, and to all of our cultural producers that make this report possible.
Sincerely,

Mitchell J. Landrieu, Mayor

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ACKNOWLEDGEMENTS

The Mayor's Office of Cultural Economy wishes to thank all of the cultural businesses and workers in New Orleans that make this city a prominent example of how the cultural economy is an economic engine in today's world.

Mt. Auburn Associates, Inc. in particular has, through its contributions to economic data and cogent analysis of employment, wages and non-profit financials in the cultural economy in New Orleans, allowed this survey to continue to break ground in cultural economy quantification. Beth Siegel of Mt. Auburn has been instrumental in the creation of this report through her guidance to source material and potential data sources. Thank you also to the Bureau of Revenue and the City's Geographical Information Systems; both were integral to completing this report. The Arts Council of New Orleans helped us design the Visual Artist Survey and distributed it to their extensive database. For providing and facilitating the procurement of the photos for this report, the New Orleans Tourism and Marketing Corporation is also much appreciated.

We would also like to thank those who contributed important information and data to this report, including Louisiana Entertainment, Marci Schramm of French Quarter Festivals Inc., New Orleans Video Access Center, and all of our survey respondents without whom this report would not be possible.

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EXECUTIVE SUMMARY

In 2010, the Mayor's Office of Cultural Economy produced the first *New Orleans Cultural Economy Snapshot*. This effort was the first of its kind in that it approaches a quantitative analysis of all aspects of the cultural economy. We are proud to present the 4th *Snapshot*, which includes more in-depth and comparative data from 2010 and earlier. This Snapshot is a tool to better understand the size, composition, and value of the cultural economy to the City of New Orleans, and we hope that it can be used by government, cultural producers, businesses, and non-profits to further opportunities to grow this industry. This report affirms the centrality of indigenous arts and culture in the creation of our City's organic fabric of neighborhoods and communities, as well as our economy. Mayor Landrieu and his Administration remain committed to nurturing and prioritizing the needs of this sector. The cultural economy is vital to New Orleans:

- The cultural sector has 34,200 jobs, which is 13.7% of the total workforce. This is an increase of 14% over 2010's 29,900 cultural jobs.
- The cultural sector was one of the few industries to experience positive employment growth (13.3%) between 2002 and 2013.
- New Orleans' cultural businesses have added jobs each and every year, and jobs have now exceeded the 2004 high.
- The number of jobs in motion picture and video production grew almost tenfold, from 286 in 2002 to 2,326 in 2013.
- There were 1,587 cultural businesses in New Orleans in 2013.
- $1.2 billion in wages were paid to New Orleans cultural workers via cultural businesses in 2013, up 4% from 2012.
- The city collected $76 million in sales taxes from cultural businesses, up 23% from 2012 and representing an estimated 44% of all sales tax revenues to the city in 2013.
- The city hosted 60 total feature film and television tax credit projects in 2013, a 62% increase from 2010.
- Local spending of film projects is estimated at $457 million for the New Orleans Region, a 25% increase from 2010.
- Including actors, there are approximately 1,294 film workers in the New Orleans region in 2013, an increase of 17% over the 1,103 workers counted in 2012.
- New Orleans' 117 live entertainment venues hosted 29,000 gigs in 2013.
- The local festival scene is thriving, with 136 festivals attended by an estimated 4.1 million people in 2013. This is a 28% increase in estimated attendance from 2010.
- In 2013, the city's museums hosted 760,000 visitors, sold $9.5 million in tickets and paid over $15 million in local payroll to 450 employees.
- Overall, the number of employees at museums rose by 6%, attendance by 3%, ticket sales by 27%, and payroll by 18%. Museums are also attracting tourists and regional visitors more each year, up 4% in 2013 from 2012.

ECONOMIC CONTRIBUTIONS OF THE CULTURAL ECONOMY

CULTURAL JOBS IN CULTURAL BUSINESSES[1]

DEFINING THE CULTURAL ECONOMY

The definition of the cultural economy used for this report is consistent with the previous updates, and is based upon the 2005 report *Louisiana: Where Culture Means Business*.[2] That report grouped the state's cultural economy into six key segments:

- Culinary Arts: The state's food-related cultural products including food processing, specialty food products and locally-owned, full service restaurants (does not include franchise/non-local chain restaurants; e.g. Wendy's, Olive Garden, etc.).
- Design: Individual Designers and firms involved in the communication arts such as graphic Design, printing, and advertising.
- Entertainment: The performing arts (music, theater, and dance), individual performers, and the film and media industries.
- Literary Arts and Humanities: Individual writers and editors and book, periodical, and newspaper publishing.
- Preservation: Economic activities focused on the restoration and redevelopment of the built environment including architecture, landscape architecture and a percentage of construction activity focused on Preservation and renovation.
- Visual Arts and Crafts: Individual artists and craftspeople as well as the galleries and museums that present cultural products.

CULTURAL JOBS IN NEW ORLEANS

In 2013, New Orleans surpassed the 2004 peak in cultural jobs in cultural industries in New Orleans. Cultural industries include those businesses and enterprises that fall under one of the six segments outlined above. There are also cultural jobs in businesses outside of these segments; more information about these jobs can be found in the second section of this chapter. The number of jobs in the cultural industries in 2013 (34,198) was a new record, surpassing the total for 2004. The low point that had to be overcome to reach this point was substantial—between 2004 and 2006, the number of cultural

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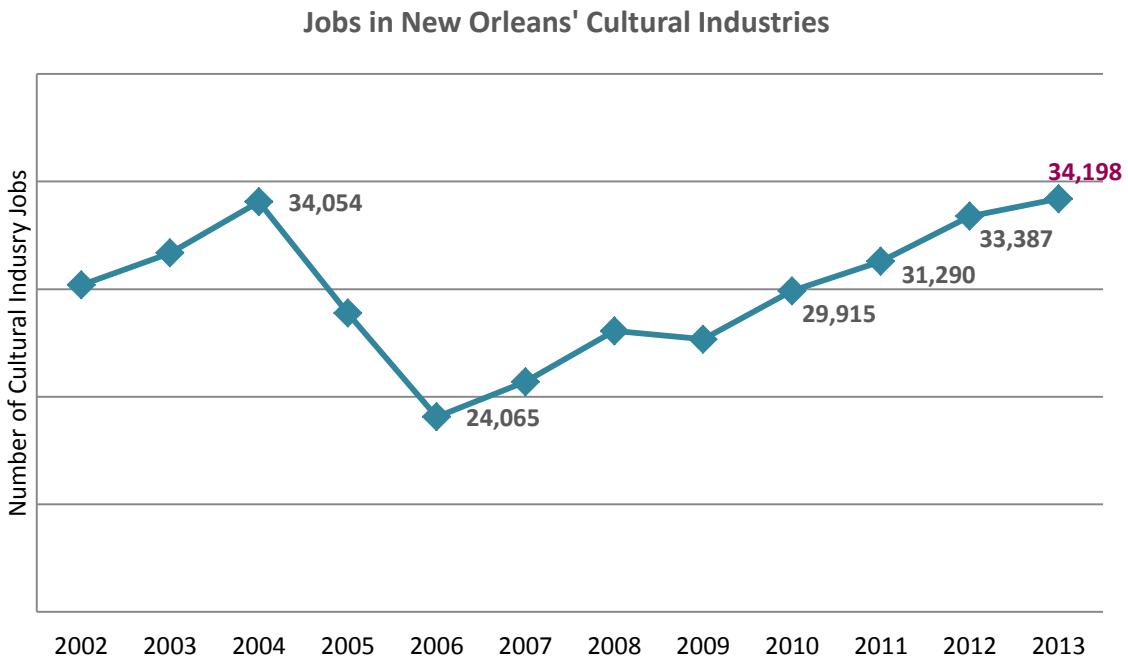
[1] This entire chapter was researched by Mt. Auburn Associates, commissioned by the Mayor's Office of Cultural Economy. The format, figures, and text have been edited to suit the purposes of this report and conform to the format of the publication.

[2] The data sources used in this report are from EMSI. EMSI's complete data set included employment (wage and salary workers) as well as the self-employed and sole-proprietors. The individual industry and occupational estimates for the period 2002 to 2013 may vary slightly from previous updates as EMSI revises data to account for newly released information and algorithmic refinements. These adjustments, when they occur, are minor. Two other refinements were also made to base business data to arrive at the most accurate depiction of New Orleans' cultural economy: 1) for industries with estimates of less than 10 employees, final numeric approximations were based upon industry trends; and 2) the large, catch-all independent artists industry was broken out using staffing patterns data to better target, and include, only those individuals working within the creative economy.

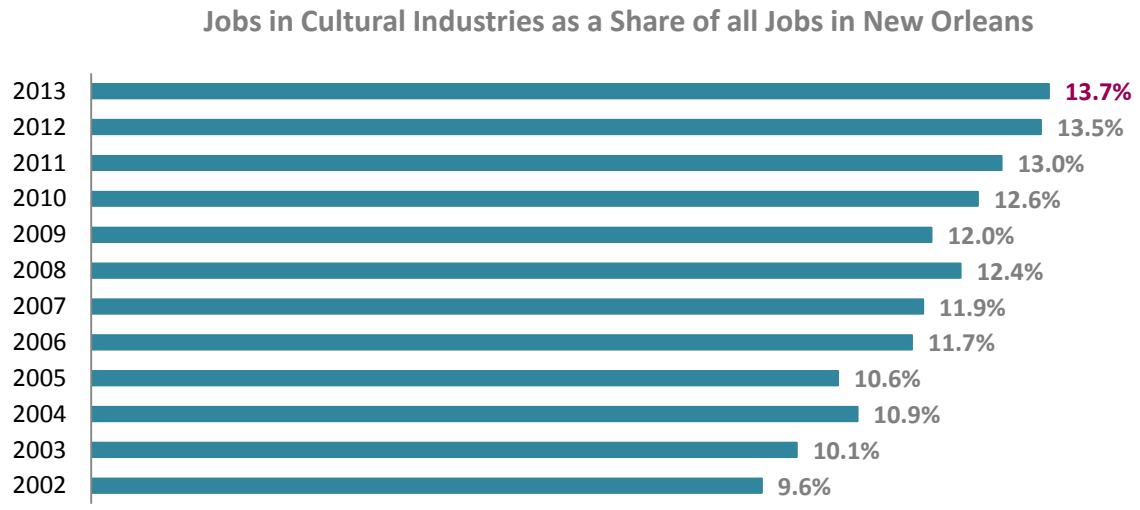
industry jobs fell from 34,000 to 24,000, a decline of almost 30%. The city's cultural industries continued to face serious challenges in the form of population loss, harsh local economic conditions, and, later on, a deep national recession, yet they were able to survive, adapt, and even thrive.



The resurgence of the cultural economy in New Orleans is even more impressive given how most of the city's other industries performed. Looking at job growth from 2002 to 2013, the New Orleans cultural industries outperformed every other major industry group. The table below provides data on a selection of these industry groups. The only sectors with similarly high growth were real estate renting and leasing, private educational services, and "other personal services" (in particular, beauty salons and household staff). As a whole, the cultural industries actually grew by about 13%.

Broad Industries	2002 Jobs	2012 Jobs	2013 Jobs	% Change (2002-13)
Cultural Industries	30,189	33,387	34,198	13.3%
Real Estate and Rental and Leasing	9,312	10,099	10,535	13.1%
Educational Services (Private)	16,376	17,653	18,363	12.1%
Other Services (except Public Administration)	18,586	20,173	20,817	12.0%
Professional, Scientific, and Technical Services	19,664	19,602	20,394	3.7%
Information (Media and Communications)	5,361	5,441	5,436	1.4%
Construction	8,720	7,851	8,246	-5.4%
Tourism	43,393	38,778	39,692	-8.5%
Mining, Quarrying, and Oil and Gas Extraction	5,218	3,598	3,921	-24.9%
Life Sciences	21,973	15,258	15,646	-28.8%
Retail Trade	22,146	15,020	15,603	-29.5%
Health Care and Social Assistance	31,422	21,706	21,758	-30.8%

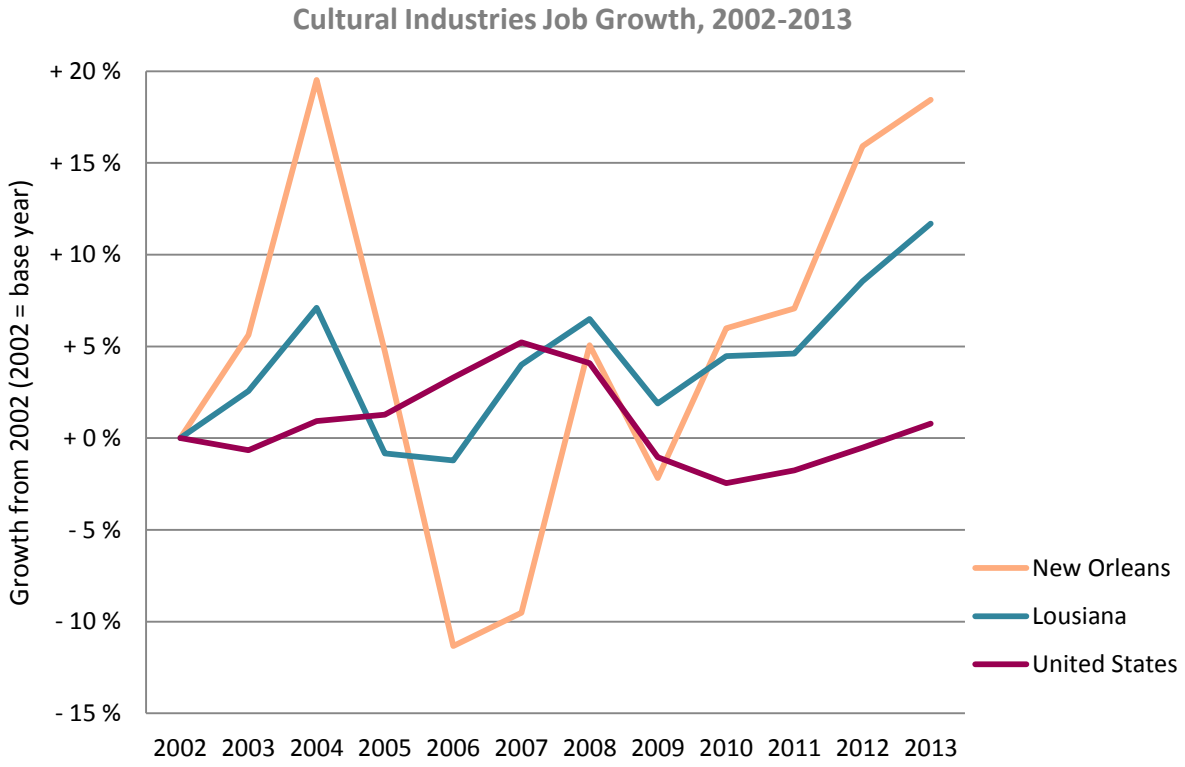
This growth was not the result of a sudden shock, but a long-term trend driven by consistently higher growth rates. The number of cultural industry jobs as a share of all jobs grew steadily over this period, from 9.6% to 13.7%. These numbers clearly show how New Orleans' cultural industries are becoming an increasingly critical part of the city's economy. In 2002, the percentage of all jobs in New Orleans that were in the cultural industries[3] was almost exactly the same as for the entire United States on average. But, by 2013, jobs in New Orleans' cultural industries were now more numerous than those of the United States by 60%.



The cultural industries in New Orleans not only are a larger percentage of the job economy than elsewhere in the country, the number of jobs also grew at a faster rate than in the United States. From 2002 to 2013, cultural jobs increased by 14.4% in New Orleans but only by 1.1% in the U.S., as can be seen in the graph on page 7. Given the effects of numerous manmade, natural, and economic incidents, this is quite an achievement.

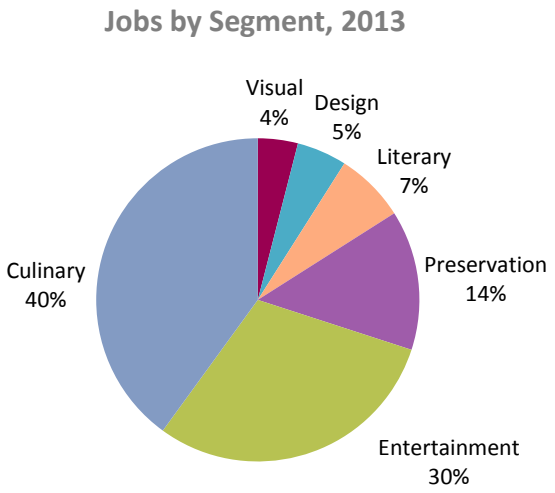
There is an impression that many cultural jobs, especially in the Culinary segment, such as staff in restaurants, or in the Entertainment segment, such as musicians or film workers, are lower-paying and more transient jobs than more "traditional" salaried jobs. According to this erroneous view, the increase in cultural jobs in New Orleans could represent a transition from more stable, salaried jobs to these more transient jobs in the cultural industries. However, the opposite is true; over the 2002-2013 period, wage and salary jobs in the cultural industries were increasing in New Orleans and shrinking in Louisiana and the United States. In the cultural industries, the percentage of self-employed jobs in New Orleans, Louisiana, and the United States were nearly equal in 2002: 32.7% in New Orleans, 33.7% in Louisiana, and 31.2% in the U.S. But by 2013, the cultural industries in New Orleans had just 36.5% self-employment, a much smaller increase than in Louisiana (44.5%) and the U.S. as a whole (42.0%).

[3] All comparisons using data for Louisiana or the whole U.S. exclude the culinary sector, construction, and drinking places, because these industries were defined in a way that applies only to New Orleans (in particular, the percentages that were used to alter the data are not likely to be valid outside New Orleans). Overall, these industries grew by about 10% in New Orleans, 18% in Louisiana, and 6% in the U.S. (if you count every job and do not make alterations).



CULTURAL BUSINESS JOBS BY SEGMENT

As mentioned earlier, this study defines the cultural economy of New Orleans by dividing it into six different segments: Culinary Arts, Entertainment, Preservation and Heritage, Literary Arts, Design, and Visual Arts. The pie chart at right breaks down the percentage of jobs in the cultural industries by segment. The largest segments, by far, are Culinary Arts and Entertainment, which together account for about 70% of all cultural industry employment. The third largest is Preservation and Heritage (14%), which is followed by Literary Arts (7%), and Design (5%). The smallest industry segment, at 4%, is Visual Arts.



To understand what segments are strong in New Orleans when compared to the rest of the country, local segment job levels can be compared to job levels in the same segment elsewhere. A location quotient (LQ) measures the size of an industry in terms of its percentage of the workforce in one place (in this case, New Orleans) relative to the same measure for a different area, (in this case, the whole U.S.). When

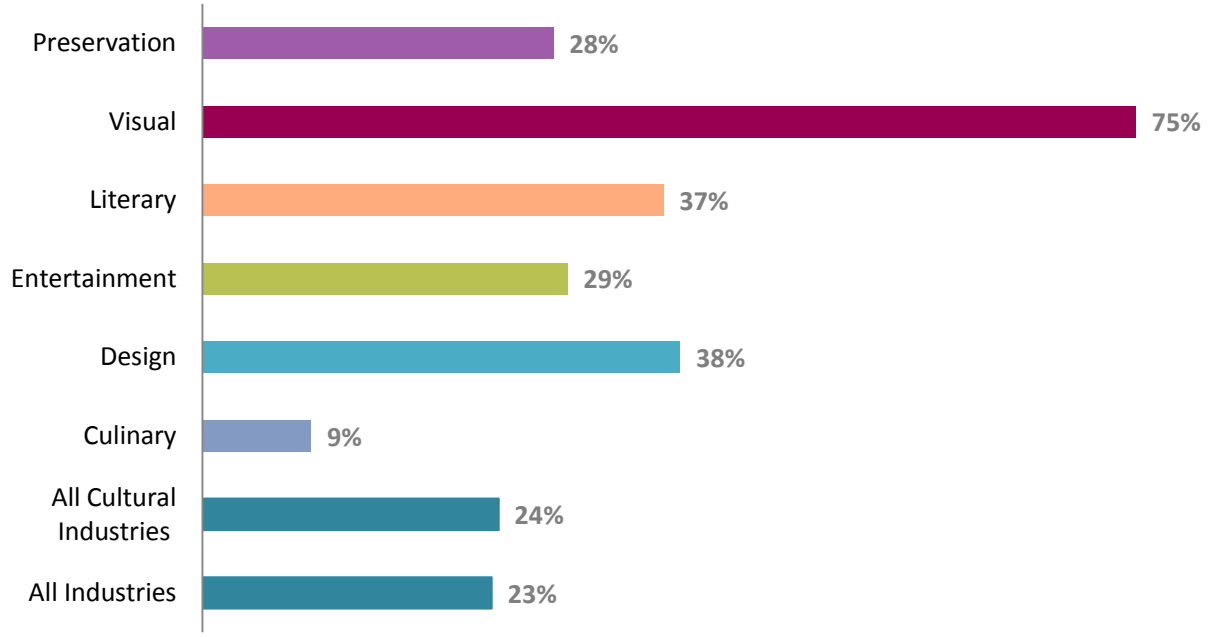
New Orleans has an LQ of 1.0, its percentage of jobs of that type is the same as in the U.S. on average; an LQ of 2 means that the percentage of jobs is twice as large as the entire U.S.; an LQ of 3 means three times as large, etc. The table at right shows the 2013 national LQ for each segment. The standouts are Entertainment (drinking places excluded) and Preservation and Heritage (construction excluded), which are both double in New Orleans than in the United States on average. Overall, cultural jobs are 60% more concentrated in New Orleans than in the entire country.

Concentrations of New Orleans Cultural Segment Jobs, 2013

Segment	New Orleans LQ (vs. United States)
Entertainment	2.09
Preservation	2.06
Visual	1.47
Literary	1.23
Design	0.80
Overall	**1.60**

Another important way in which the segments differ from each other is by the way employment is generally structured. Some industries have a very high number of freelancers and other types of self-employed workers, while in other industries wage and salary employment is the norm. The graph below shows just how much variation there is in the different cultural economy segments and the overall economy. Employment in every segment except for Entertainment has shifted toward self-employment since 2002, but as can be seen at the bottom of the graph, there the proportion of self-employed is no higher than that in all New Orleans industries.

Self-Employment as a Share of Industry Segment, New Orleans 2013



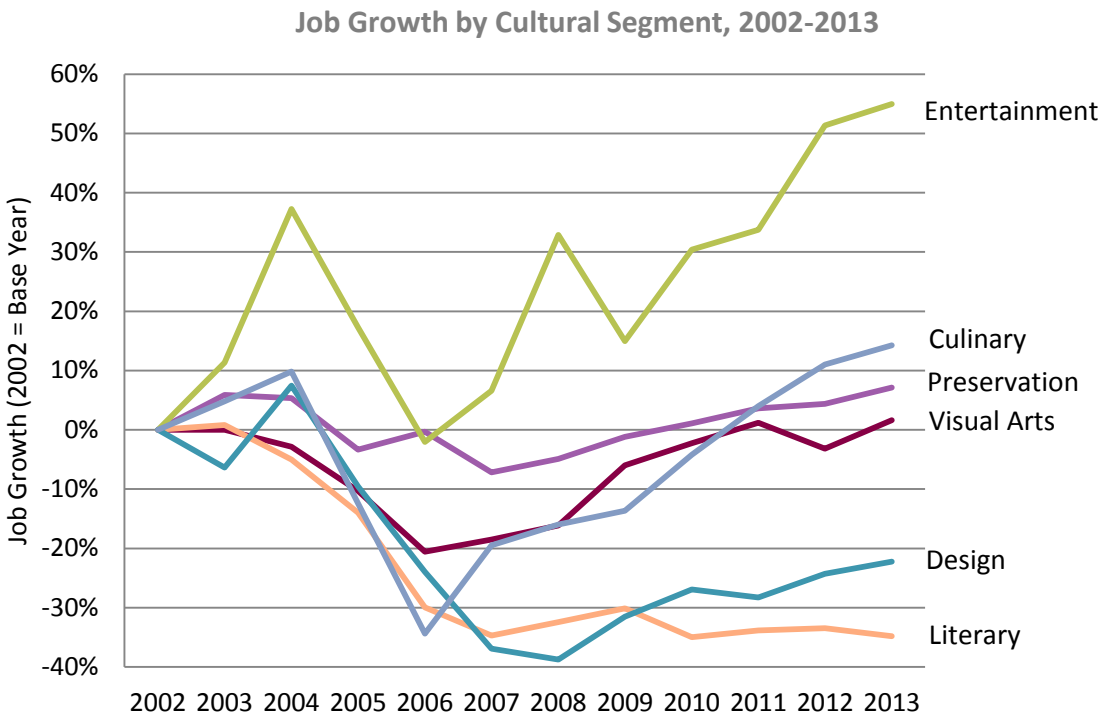
While growth in the cultural industries across all segments has been positive from 2002-2013, it has been uneven, and some segments have shrunk. Entertainment and Preservation grew faster than those segments did in the U.S. as a whole. Design, Visual Arts, and Literary Arts all had lower job growth in

New Orleans than they did nationally. However, across all segments, cultural job growth was 14% in New Orleans and only 1% in the United States over the last decade.[4]

Industry Segment Job Growth 2002-2013, New Orleans vs. US

Segment	New Orleans	United States
Entertainment	76%	13%
Preservation	12%	6%
Visual	2%	9%
Design	-22%	-5%
Literary	-35%	-16%
Overall	**14%**	**1%**

Each segment exhibited a unique growth pattern. The levee failures, storms, and other incidents had a major impact on almost every segment, but the degree to which cultural industries have recovered has varied tremendously. There are four segments with positive net growth between 2002 and 2013, and they all reached their highest employment levels in 2013.



- Entertainment was the city's fastest expanding cultural segment by far, growing from 6,744 jobs in 2002 to 10,448 jobs in 2013, an increase of 55%. Much of the growth in this segment was driven by the film and television production industry, which greatly expanded operations in

[4] Culinary Arts are not included in the job growth comparison table because it is not possible to apply the filters used to weed out national chains and other non-cultural culinary jobs and enterprises on a national level. The measures for Culinary Arts used in this study for New Orleans are unique to the city.

Louisiana in response to the development and strengthening of state motion picture tax credits in 2004.

- The number of jobs in motion picture and video production grew almost tenfold, from 286 in 2002 (before the tax credit program) to 2,326 in 2013, and the true growth rate and number of jobs is likely even higher due to the fact that many actors and other workers in the industry—probably around 500—are technically employed by payroll companies.[5]

- Culinary Arts had the sharpest decline of any of the cultural industry segments after 2005, losing 40% of its 13,101 jobs between 2004 and 2006, but it also had the strongest recovery. By 2012, the segment's employment level had surpassed its 2004 peak, and in 2013 it continued to grow, reaching an estimated 13,627 jobs. The industries most responsible for the segment's long-term growth are food services (restaurants, catering, and food trucks).

- Employment in the Preservation and Heritage industries grew by about 7% between 2002 and 2013, reaching a new high with 4,704 jobs by the end of 2013. The number of jobs fell from the segment's pre-Katrina peak of 4,650, but because of a construction boom post-Katrina, it never went below 4,000. If construction jobs are taken out the equation, the segment's pattern of growth over time is actually very similar to the average for the cultural industries—a steady rise in job numbers interrupted in the middle by a sharp decline of 25 to 30%, with an overall growth rate of 12 to 13%.

- Visual Arts and Crafts also recovered from its 2005-2006 lows. In 2013, the segment reached a new employment peak with 2,309 jobs. This was 28% higher than its 2006, but still just 2% higher than its 2002 job levels.

THE ENTERTAINMENT SEGMENT: COMPARABLE CITIES

Entertainment businesses are becoming increasingly important in New Orleans, but the numbers only provide part of the story. The following analysis provides more context by comparing the New Orleans entertainment segment to the entertainment segments in other cities across the country.[6] The importance of entertainment-related jobs in New Orleans was compared to a selection of large and mid-sized cities by looking at the proportion of total jobs that this segment represented.

Not surprisingly, in some of the traditional entertainment centers—New York, Nashville, and Los Angeles—the proportion of jobs in the segment is higher than in New Orleans. With a 3.5% share of overall jobs across all industries, the entertainment sector in New Orleans is still double the national average, which puts the city on the upper end of a tier which includes cultural centers like Portland (OR), Austin, and Atlanta.

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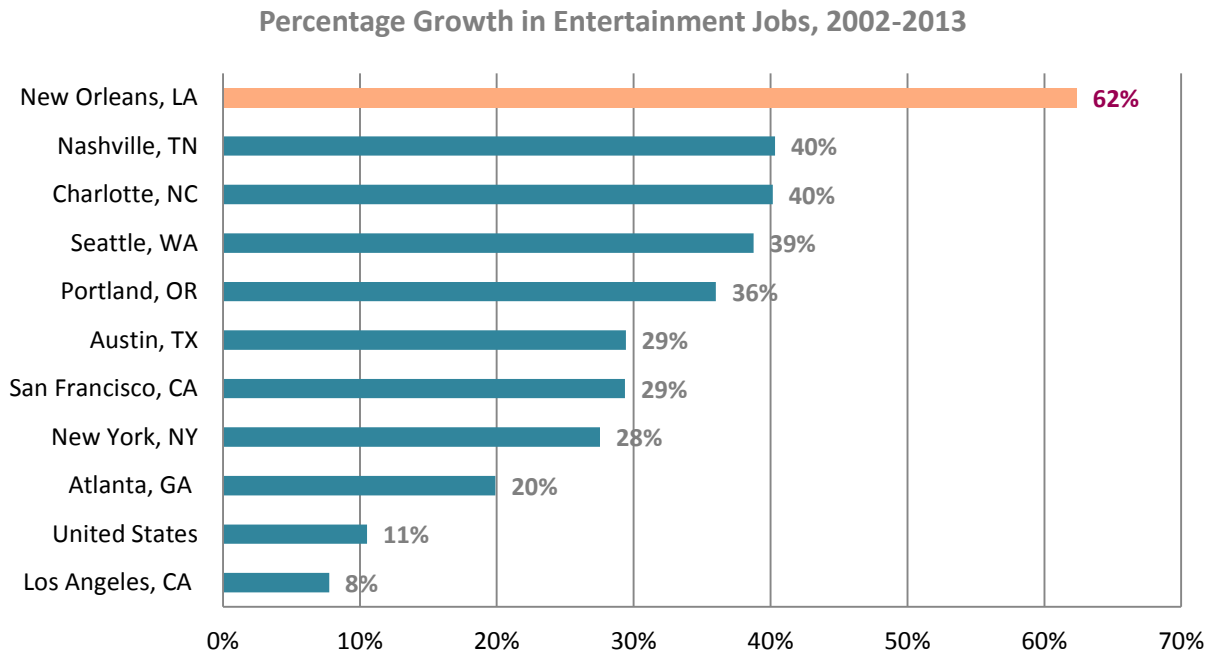
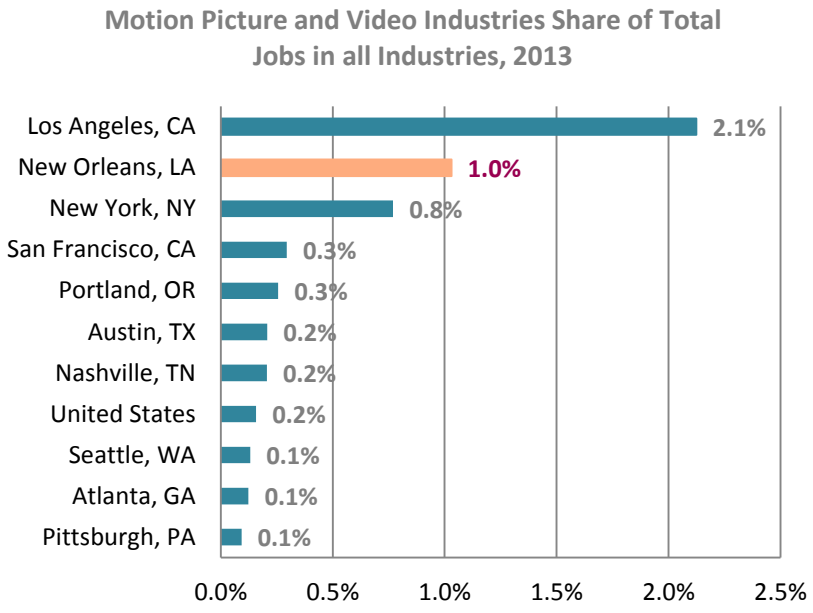
[5] See Methods and Sources for a discussion of the complexities in estimating employment in the film industry.
[6] In order to ensure methodological rigor without sacrificing efficiency, the analysis in this section used an Entertainment segment definition slightly different from the one used in the rest of this update: drinking places and fine arts schools (which were known to be mostly entertainment-related in New Orleans) were excluded, and the entire independent artists, writers, and performers category was included.

The graph below compares Entertainment employment growth since 2002 in major cities across the country.[7] While New Orleans has the fewest actual number of jobs in the segment of any of the comparison cities, it is the city with the highest growth rate by far. In fact the 62 % employment increase in the New Orleans Entertainment industries was 22 points higher than the growth of the second-fastest growing Entertainment segment (Nashville, TN).



If we examine jobs related to the film and television industries only, excluding Entertainment jobs related to other businesses (such as music), the relative importance of New Orleans as it relates to the film industry is striking. In terms of percent of total employment, the only city where film and video is more important is Los Angeles.[8] In terms of absolute number of film and video jobs, New Orleans ranks third, behind only Los Angeles and New York.



[7] Since reliable industry employment data is only available at the county-level, the job counts for all the communities except for New York, New Orleans, and San Francisco include some surrounding communities outside the city-proper.
[8] Defined by the four NAICS codes covering the motion picture and video industries (motion picture and video production, motion picture and video distribution, postproduction services, and other motion picture and video industries),

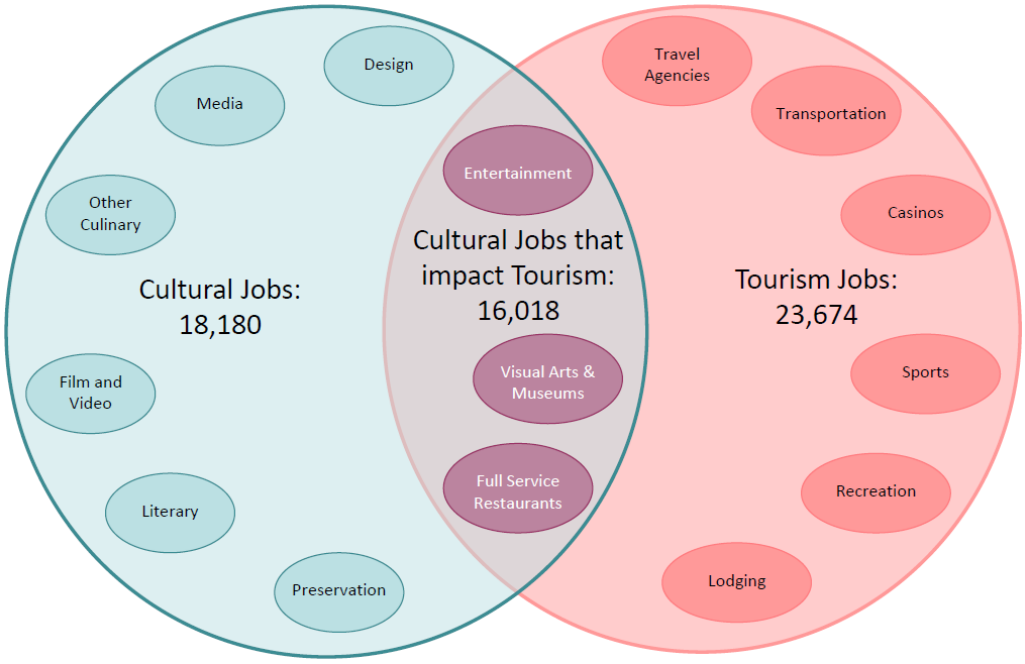
THE CULTURAL SECTOR AND THE TOURISM SECTOR

The cultural and tourism sectors in New Orleans are closely intertwined. As described in previous updates, the definitions of these two sectors of New Orleans' economy do overlap, though there remain distinct and important differences between them as far as how they are defined and whom they employ.

Cultural enterprises, for instance, include firms in the Design, Literary, and Preservation sectors, large employment areas not explicitly included in tourism definitions. However, while not part of the larger tourism sector, these firms do help to create the foundation upon which tourist-based strategies can thrive. Conversely, for tourism, industries such as transportation, casinos, sports, recreation, and lodging are all included—industries absent from the cultural economy.

Thus, while the tourism sector revolves around the resources and amenities needed to provide for tourists, the cultural sector represents core elements of what makes a place creatively and culturally vibrant. These two sectors overlap in significant ways, contribute to the other's success, and, as shown in the figure below, are increasingly intertwined.

While about 40% of all tourism-related jobs in New Orleans are also considered in the cultural industries,[9] there are an additional 23,674 jobs in the tourism cluster in New Orleans that are outside of the cultural sector. These include jobs in hotels, casinos, and sightseeing. One can clearly make the case that the cultural sector in New Orleans is a key driver of these additional jobs, further enhancing the economic importance of the cultural industries to the city's economy.



[9] The definition for the tourism sector is based upon the definition used by EMSI in its industry groupings. Modifications to this definition were made based upon the New Orleans context.

CULTURAL JOBS IN NON-CULTURAL INDUSTRIES

Most studies on economic sectors focus on industries. The section above looks at cultural businesses (also referred to as enterprises and industries) and the jobs that those businesses provide in total. For example, a locally owned restaurant is considered a cultural business under the Culinary Arts segment. Every employee of that restaurant, from the chef to the wait staff is counted in the above section as jobs in cultural industries.

This is only a partial picture of cultural employment. Non-cultural jobs in cultural industries are counted as cultural jobs because without that chef, the restaurant would not exist and neither would the non-cultural jobs associated with it. In a similar but opposite vein, many businesses that would not be defined as cultural industries employ cultural workers. For example, an architect could be employed by a construction or engineering firm, a musician could work in a church, or a graphic designer could work for a manufacturer. This section looks at those jobs in businesses that don't fit within one of the six segments.

In 2013, there were approximately 4,078 cultural jobs in other industries. There are some segments where the number of jobs in non-cultural industries is larger than those in the cultural industries such as Visual Arts and Design. Firms in these industries generally do not require a lot of support staff, and self-employment is common. Artists and designers also often work for firms in other cultural segments, like Entertainment, or for employers outside the cultural sector.

In terms of jobs categorized by type, not cultural segment, New Orleans has a very high number of actors, musicians and singers, photographers, writers, chefs, and graphic designers—all producers of core creative products upon which entire segments of the cultural economy are built. The largest job category in New Orleans, "Entertainers, Performers, Sports and Related Workers, All Other" is actually a category for miscellaneous jobs that do not fit into another job category as defined by national labor data sources. Some evidence suggests that these jobs may be associated with motion picture and video production, but there is no hard evidence on what these jobs actually are, but it seems likely that they involve cultural work.[10]

Looking at the jobs with the highest location quotients reveals a somewhat different set of strengths. Some of the jobs with the highest location quotients are also high in terms of absolute number of jobs. New Orleans has 7 to 9 times more jobs in the Entertainers and Actors categories than the U.S. does on average.

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[10] The large size of this job category group in New Orleans is an anomaly, not just in EMSI's data but also in the official *Occupational Employment Statistics* published by the Bureau of Labor Statistics, which as recently as May 2011 reported only 40 jobs in the occupation in the whole state. In the 2012 release, there were suddenly more than 1,500 wage and salary jobs in the occupation in the New Orleans-Metairie-Kenner MSA, an LQ of 23.22. EMSI, which inferred that most of the jobs were in New Orleans proper, gives an even higher LQ of *50* for the city. Mt. Auburn was unable to obtain an explanation or any more information on this occupation from the BLS or from the state agency responsible for collecting the occupational data due to privacy concerns.

Top Cultural Jobs in New Orleans vs. Concentration in the United States, 2013

Job Category	2013 Jobs	2013 Location Quotient (vs. US)
Entertainers and Performers, Sports and Related Workers, All Other	1,485	9.05
Actors	1,350	7.16
Curators	90	6.27
Anthropologists and Archeologists	62	5.90
Camera Operators, Television, Video, and Motion Picture	179	4.20
Chefs and Head Cooks	458	2.49
Archivists	20	2.48
Set and Exhibit Designers	49	2.24
Radio and Television Announcers	185	2.21
Audio and Video Equipment Technicians	255	2.11
Producers and Directors	388	2.03
Musicians and Singers	1,130	1.78
Writers and Authors	801	1.43
Public Relations Specialists	354	1.02
Photographers	1,120	0.98
Graphic Designers	505	0.89

Several of the most highly concentrated jobs are involved in museums and academic research: Curators, Anthropologists/Archaeologists, and Archivists; New Orleans has about 6 times as many of these jobs compared to the U.S. at large. These workers play a key role in preserving and promoting the artistic and cultural heritage of New Orleans, and their high relative concentration is indicative of the city's strengths in that area. The rest of the jobs with LQs in the top 10 are film and/or media-related: Camera Operators, Radio and Television Announcers, Audiovisual Equipment Technicians/Operators, and Set and Exhibit Designers (who could also be associated with theaters, museums, or other attractions).

WHERE CREATIVE WORKERS ARE EMPLOYED

Most of the people working in cultural jobs in New Orleans work inside the cultural industries, but many work outside of it. 4,078 workers are not captured by the cultural industry statistics—while the 34,198 jobs in creative industries make up 13.6 % of all employment in New Orleans, the share of all employment that is part of the cultural economy is actually higher. Since approximately 38,276 of the 250,546 jobs in New Orleans are either part of a cultural occupation or a cultural industry, the cultural economy includes 15.3% of all employment if we count those cultural jobs in non-cultural industries.

Where do these 4,000-plus cultural workers work outside of the cultural sector? Approximately 700 cultural workers work in a category called "All Other Professional, Scientific, and Technical Services." Most of these workers are freelance photographers who have a different primary source of income.[11]

[11] "All Other Professional, Scientific, and Technical Services," is supposed to include only certain miscellaneous service industries not otherwise classified. The EMSI cross-staffing figures suggest that the "All Other … services" category is

Many work at institutions of higher education—public and private postsecondary schools together employ about 450 cultural workers, in addition to instructors and teachers, which get combined into one category in national labor statistics and are not counted as cultural jobs. Hotels and casino hotels employ approximately 400 cultural workers, mostly chefs and entertainers, while religious organizations employ about 230 workers, mostly musicians, singers, and music directors. Engineering firms employ over 100 architects and architectural drafters, and food service contractors and limited service restaurants employ roughly 150 chefs. The thousands of other cultural workers work at wide variety of retail, manufacturing, and personal services firms, as well as in local and federal government.

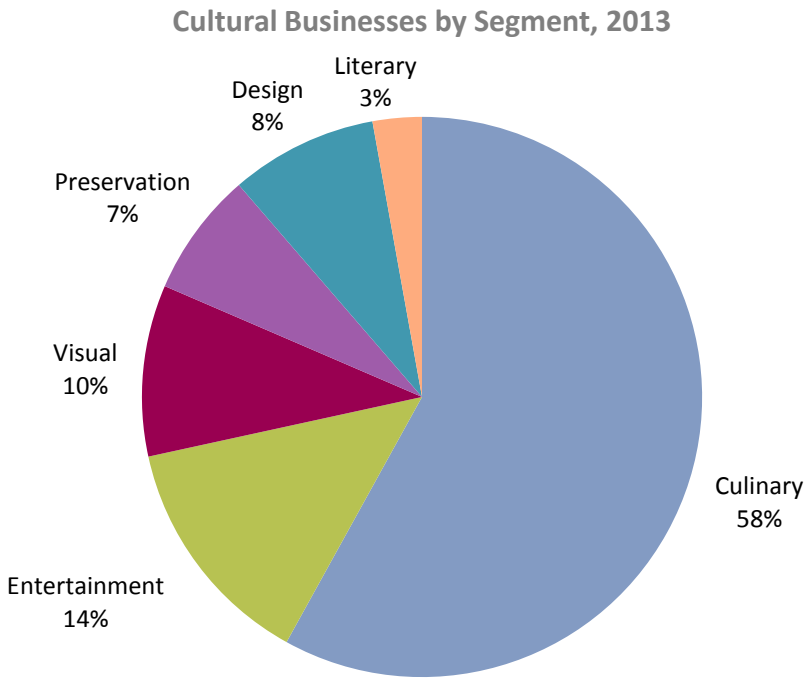
being used—in apparent opposition to the exclusive way it is defined—as a catchall for photographers who freelance for businesses other than photography (such as newspapers or other media).

ECONOMIC CONTRIBUTIONS OF THE CULTURAL ECONOMY

BUSINESSES

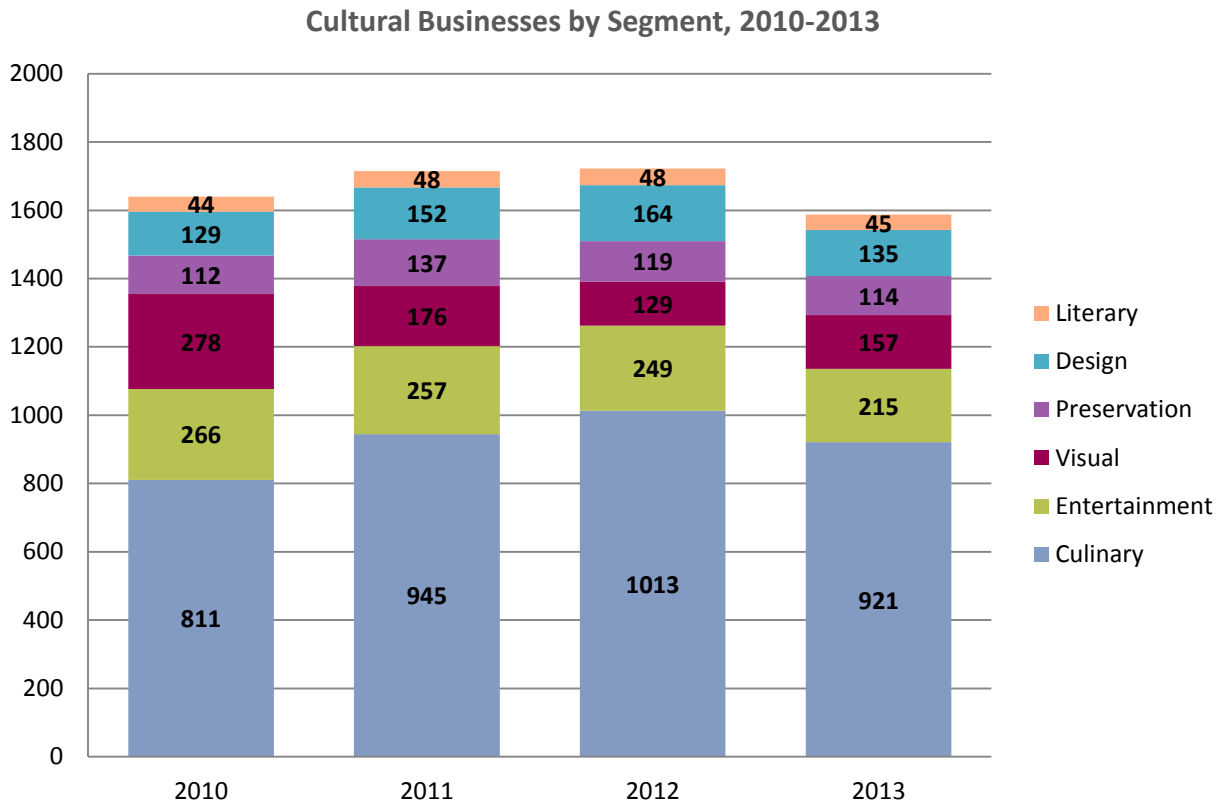
Cultural businesses are locally owned or operated and provide a service or product in one of the six cultural economy segments defined on page 3. National chain restaurants and other national and international companies that do not have a significant employment presence in the parish or do not do work in Orleans Parish were excluded from the data in order to give a better picture of New Orleans' cultural economy.[12]

Most cultural businesses in New Orleans are small businesses, concentrated along the following neighborhood corridors: Magazine Street, Uptown, the Lower Garden District, Carrollton Avenue, the French Quarter, the Warehouse District in Downtown, the Marigny, Treme, Harrison Avenue in Lakeview and Mid-City. Altogether, these neighborhoods account for 75% of cultural businesses in New Orleans.



This survey found 1,587 cultural businesses in New Orleans in 2013 ranging from cooking schools, restaurants, art galleries, and architects; to independent presses, music venues, specialty plasterers, and graphic design firms.

[12] Please note that "Businesses" does not include most non-profits. Cultural non-profits are covered in the Non-Profits section. It also does not include public institutions such as libraries, although university presses are included.



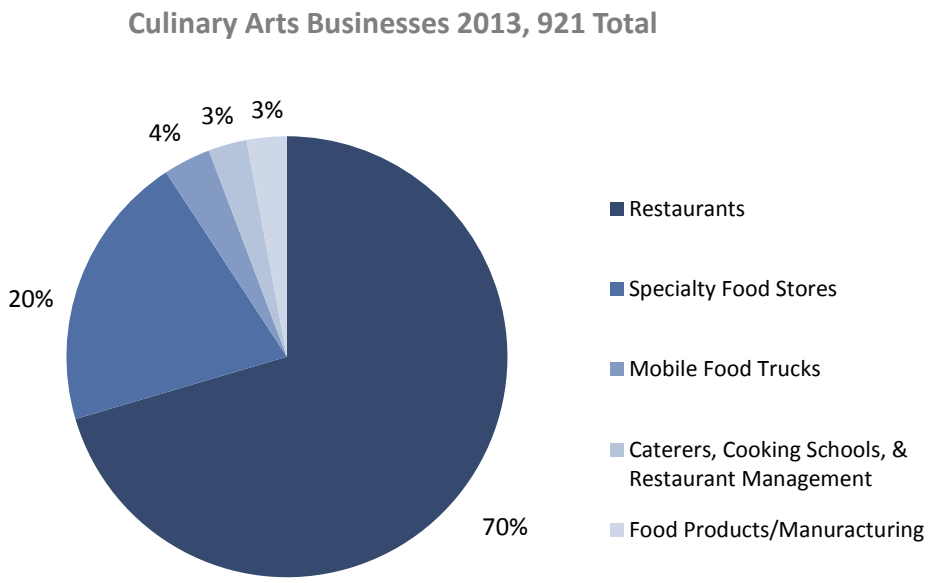
Compared to 2012, there was an 8% decrease in the number of active cultural businesses in 2013. Visual Arts and Crafts had a large increase of 21% since 2012. Although the other five segments showed a decrease in the past year, there still are 14% more Culinary businesses than there were in 2010, and a 5% increase in Design businesses.

Although there were less active/open cultural businesses in the city in 2013, both employment within and without cultural businesses and wages for cultural jobs are higher than they were in 2012. It is possible that while some smaller businesses have closed (both restaurants and music clubs can have high chances of failure in the first year of operation) other successful businesses have increased hiring. So the city could be looking at a consolidation of successful businesses as other businesses fold. It is also possible that more cultural jobs have become available outside of the independent, local cultural businesses examined in this chapter, accounting for the increase in jobs and wages. See the Employment chapter and the Earnings and Wages chapter for more information.

BUSINESSES BY SEGMENT

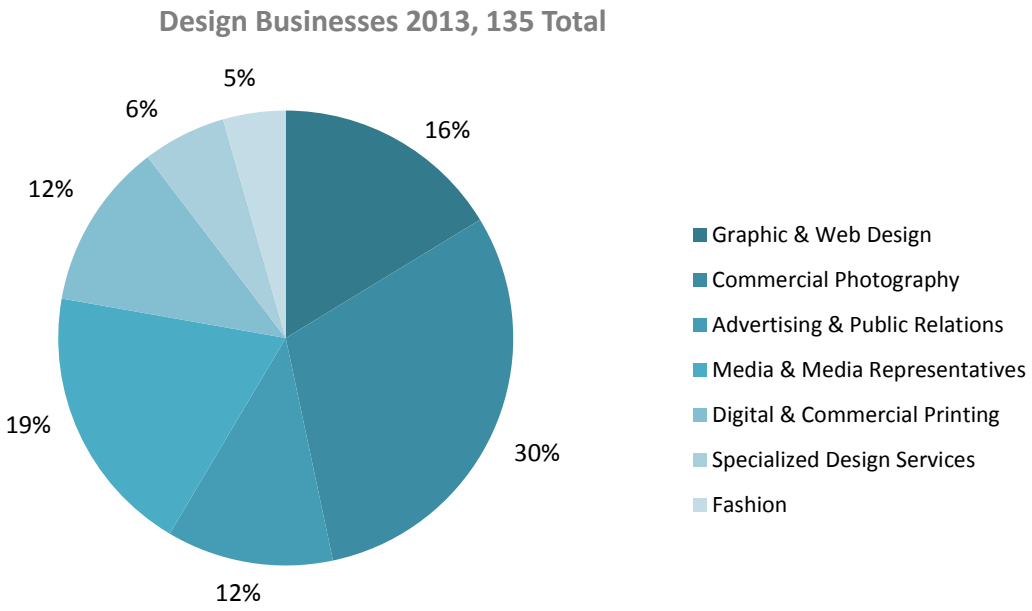
CULINARY

Culinary includes 921 of the following types of locally owned and operated businesses: caterers, cooking schools, food manufacturing, mobile food trucks, restaurants, restaurant management, and specialty food stores. Specialty food stores, such as bakeries, confectionaries, snow ball stands, and coffee shops increased their share of Culinary businesses by 7% since 2011.



DESIGN

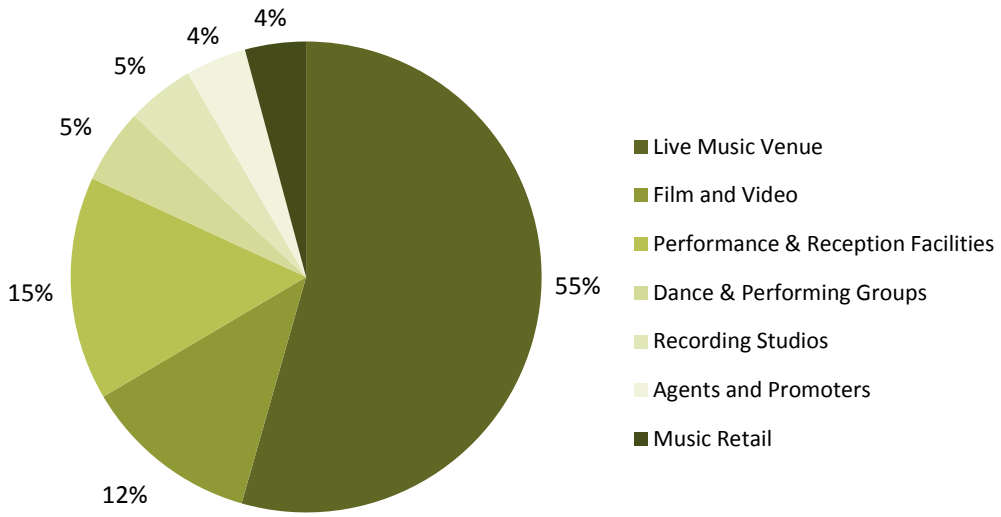
This segment contains 135 of the following types of businesses: advertising, public relations, digital and commercial printing, fashion, graphic and web Design, media and media representatives, commercial photography, and specialized Design services.



ENTERTAINMENT

The Entertainment segment contains businesses of the following types: music and performing arts venues; film and video; performing groups; recording studios; retailers; and agents. Live Music Venues have increased by 6% since 2012 and have increased their share of all Entertainment businesses by 11%.

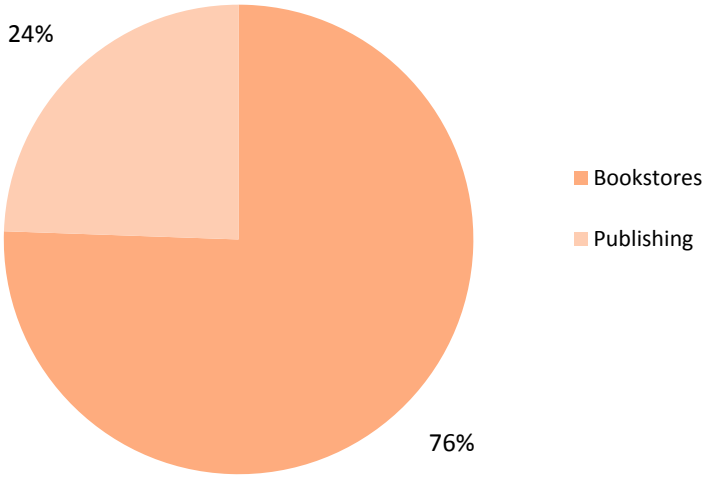
Entertainment Businesses 2013, 215 Businesses



LITERARY

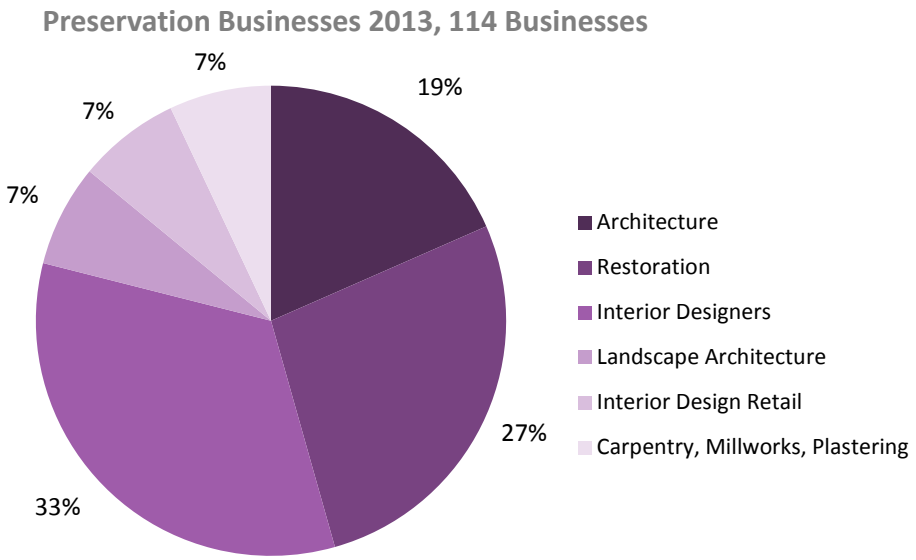
This is the smallest commercial segment including only 45 businesses comprised of presses/publishing businesses and bookstores. Bookstores make up 76% of Literary businesses in the city in 2013, while Publishing has decreased its share by 5%.

Literary Businesses 2013, 45 Total Businesses



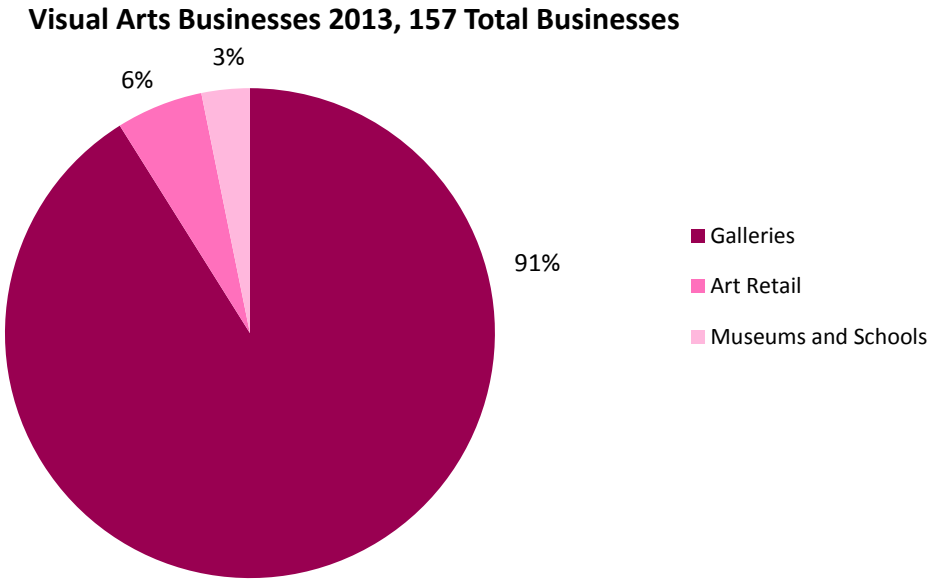
PRESERVATION

Preservation includes a *selection* of architects, interior design retailers, interior designers, landscape architects, restoration contractors and firms, renovation firms, and craftsmen/workshops that specialize in the preservation of the built environment and the restoration of older homes and buildings.



VISUAL ARTS AND CRAFTS

This segment includes 143 galleries, a 25% increase since 2012. As more galleries obtain occupational licenses and new art districts like the Bywater and St. Claude flourish, these increases are expected. Art supply retailers, for-profit museums, and for-profit arts centers and schools are also included.



METHODOLOGY

Cultural businesses were counted from a variety of sources. The Bureau of Revenue and the Geographical Information Systems of the Information Technology and Innovation Department of the City of New Orleans provided the base business list with occupational codes. This list was created by looking for all businesses in the metro area with active accounts.

The Office of Cultural Economy selected those businesses whose occupational codes matched those used by Mt. Auburn Associates, a research firm procured by the Office of Cultural Economy, in the Employment chapter, and conducted primary research to correctly classify those businesses into one of the 6 cultural economy segments and confirmed their status as open businesses currently operating through the use of sales tax data. Next, the Office researched and contacted businesses throughout the city to record newer businesses that may not have been on the original Revenue list and to eliminate national chain stores and restaurants.

ECONOMIC CONTRIBUTIONS OF THE CULTURAL ECONOMY

EARNINGS AND WAGES[13]

Overall, cultural workers earned $1.17 billion in 2013. As seen in the table below, Culinary and Entertainment employees received the most wages, due to the fact that these two segments have the largest number of employees. The total amount of earnings only decreased in the Culinary and Visual Arts segments between 2012 and 2013. Overall, earnings increased 4% for all cultural economy segments. Preservation and Design had the largest increase in earnings over the year, both up more than 33% since 2012. For all cultural jobs, the average annual salary was $34,216 in 2013.

Overall Earnings

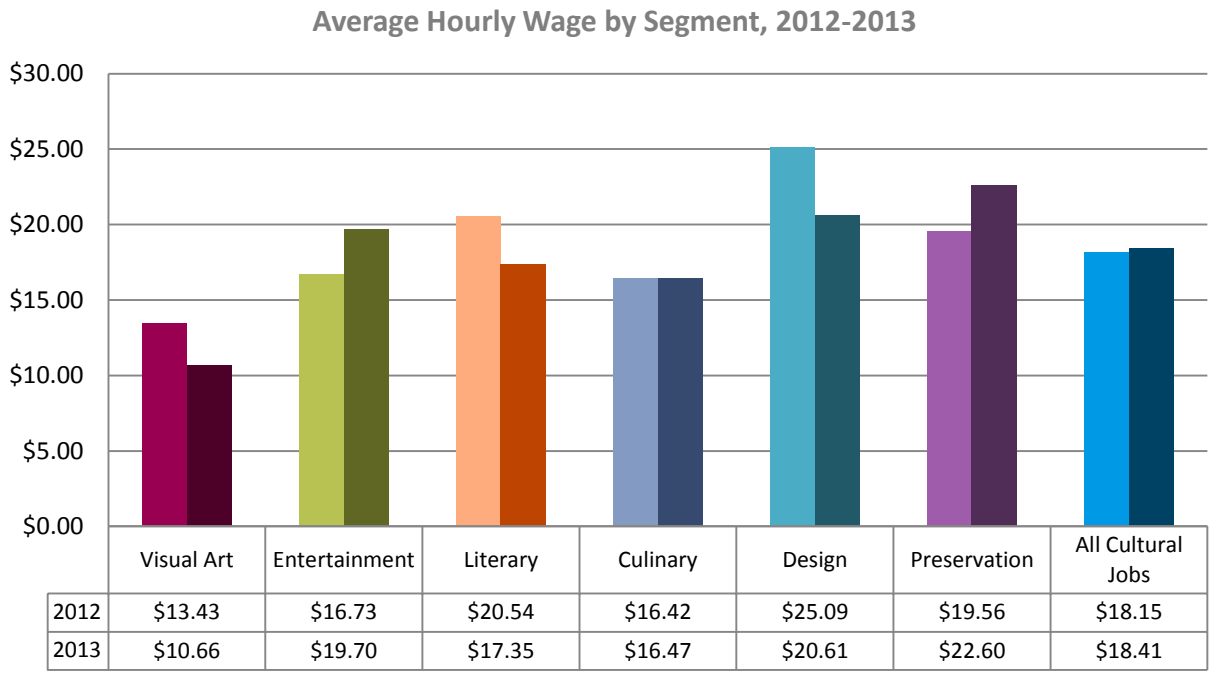
Segment	2011	2012	2013	Change (2012-2013)	Percent Change 2012-2013
Culinary Arts	$406,993,514	$426,689,424	$421,828,844	($4,860,580)	-1%
Entertainment	$370,021,085	$323,409,961	$332,986,111	$9,576,150	3%
Preservation	$225,811,914	$159,231,464	$215,071,613	$55,840,149	35%
Design	$99,034,462	$82,382,856	$110,610,400	$28,227,544	34%
Visual Arts	$71,663,269	$74,035,848	$30,564,095	($43,471,753)	-59%
Literary	$66,892,209	$54,642,499	$59,065,837	$4,423,338	8%
Totals	**$1,240,416,453**	**$1,120,392,052**	**$1,170,126,900**	**$49,734,848**	**4%**

The average hourly wage for cultural jobs in 2013 was $18.41, slightly higher than in 2012 ($18.15). Entertainment hourly wages rose an impressive 18%. Preservation also had a large increase of 16% in hourly wages in 2013 compared to 2012. To get a better idea of what many cultural jobs pay on average, the chart below looks at the top ten cultural jobs by size and shows the average hourly wage earned by these jobs in 2013.

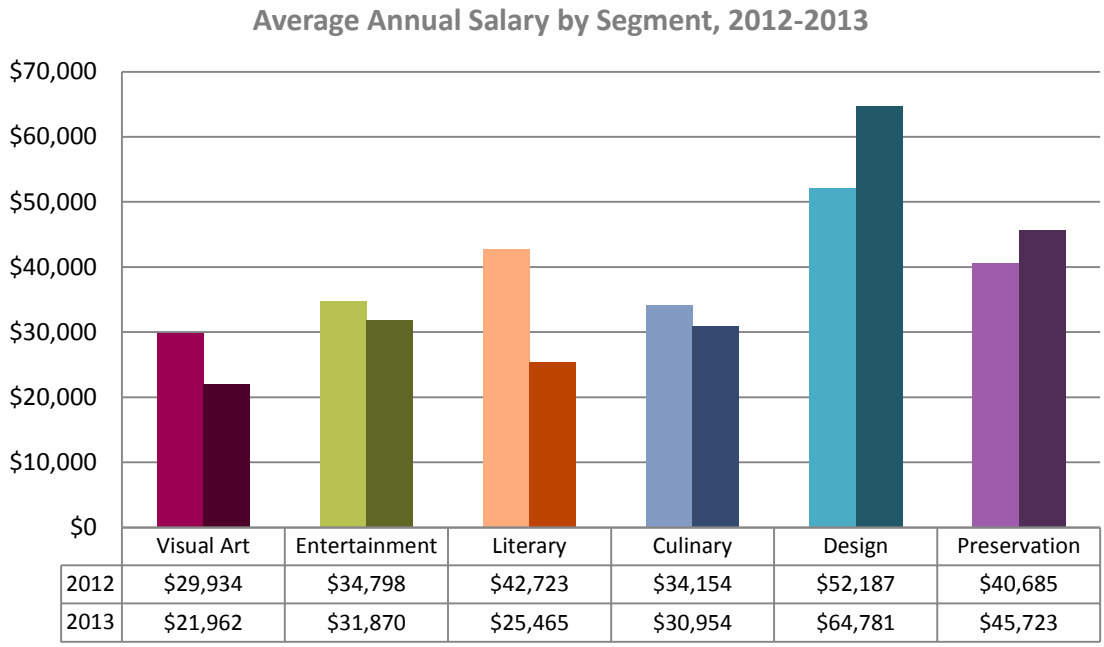
Average Hourly Wages of Top Ten Cultural Jobs in New Orleans

Occupation	2013 Jobs	Avg. Hourly Wages
Entertainers and Performers, Sports and Related Workers, All Other	1,485	$14.60
Actors	1,350	$21.15
Musicians and Singers	1,130	$21.20
Photographers	1,120	$9.99
Writers and Authors	801	$13.22
Graphic Designers	505	$19.15
Chefs and Head Cooks	458	$18.47
Producers and Directors	388	$33.84
Carpenters	363	$15.11
Public Relations Specialists	354	$22.77

[13] The wage data was researched by Mt. Auburn Associates, commissioned by the Mayor's Office of Cultural Economy.



	Visual Art	Entertainment	Literary	Culinary	Design	Preservation	All Cultural Jobs
2012	$13.43	$16.73	$20.54	$16.42	$25.09	$19.56	$18.15
2013	$10.66	$19.70	$17.35	$16.47	$20.61	$22.60	$18.41



	Visual Art	Entertainment	Literary	Culinary	Design	Preservation
2012	$29,934	$34,798	$42,723	$34,154	$52,187	$40,685
2013	$21,962	$31,870	$25,465	$30,954	$64,781	$45,723

ECONOMIC CONTRIBUTIONS OF THE CULTURAL ECONOMY

GROSS SALES AND LOCAL SALES TAXES[14]

Cultural businesses in New Orleans contribute significantly to the local economy through employment and paying wages. They also utilize their sales revenue to purchase local goods and services and pay their workers. Those workers in turn use their wages to pay taxes and purchase goods and services. These are indirect economic impacts of cultural businesses on the City's overall economy. Indirect impacts are estimations based on gross revenue or sales; in this snapshot, we are simply quantifying the input of cultural businesses into the economy of the city through sales revenue and the general economy through gross sales.

In 2010, cultural businesses grossed a total of $3.4 billion in sales revenue and $3.5 billion in 2011, a growth of 2.5%. In 2012, the gross sales only totaled $3 billion, a drop of 12% from 2010. Delayed economic repercussions in the city from the 2008 financial crisis could be the cause of the contraction in sales, as well as the ending of the post-2005 construction boom. In 2013, cultural businesses have so far reported $3 billion in sales, and may exceed 2012 totals as businesses continue to report to the city.

Direct contributions to the economy also come from sales taxes paid by cultural businesses to the municipal government, funding public services, programs, and infrastructure enhancement and maintenance, which in turn benefits businesses as an indirect impact. In 2010, cultural businesses contributed $65.6 million in sales taxes to the City of New Orleans and $72 million in 2011. This is an impressive growth of 10%. However, in 2012, just as gross sales were lower, sales taxes were also lower, totaling $61.3 million for the year. However, 2013 has seen a full recovery of sales tax collection surpassing 2011 levels. Cultural businesses have paid $75.6 million in sales taxes so far for the 2013 fiscal year, up 23% from 2012. These findings are summarized in the table below.

Gross Sales Revenue and Local Sales Taxes Summary, All Cultural Businesses

	2010	2011	2012	2013	% Change 2012-2013
Total Sales Revenue	$3,457,628,803	$3,542,463,550	$3,015,020,125	$2,997,430,607	-1%
Total Local Sales Taxes Paid	$65,616,362	$72,009,630	$61,389,617	$75,615,894	23%

GROSS SALES REVENUE BY SEGMENT AND BUSINESS TYPE

Culinary businesses, already the leader in both employment and number of businesses, also collect the highest sales revenue by far, totaling almost $2.3 billion in 2013, an increase of 2% from 2012.

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[14] A list of business descriptions and the associated segment assignments is available at the end of this chapter. Although more business types are associated with the cultural economy, only business types that had a registered business in the city were included. All data years (2010-2012) prior to 2013 were updated with new sales tax and gross sales data. Not all collections of tax or reports of sales are available for the previous year at the time of publication, and the data in this chapter is repeatedly updated to reflect updated payments and reports by businesses. All data is from the City of New Orleans, Bureau of Revenue, Department of Finance.

Entertainment is second in sales revenue, a large amount of its sales revenue coming from small bars and venues that host live entertainment and the selling of recorded music. In 2013, the Entertainment segment netted $349 million in sales, an increase of 19% from the 2012 low. Indeed, most segments, with the exception of Design, seem to be recovering from 2012 and once again approaching 2010 and 2011 highs.

Impressive increases are also evident for the Visual Arts and the Preservation segments. Both have increased gross sales by 45% since 2012, and while still below 2010 and 2011 highs, are quickly regaining ground. The large decrease in Design sales revenue is likely due to two factors: most of the businesses classified as Design businesses do not sell objects or other services subject to city sales tax; and there are some businesses that have not yet reported the last quarter of 2013 as of this writing.

Gross Sales Revenue by Segment

Segment	2010	2011	2012	2013	% Change 2012-2013
Culinary	$2,588,841,827	$2,663,137,676	$2,250,325,236	$2,287,429,307	2%
Entertainment	$330,801,086	$364,339,973	$293,062,153	$349,592,973	19%
Literary	$261,059,880	$288,416,532	$142,060,433	$142,796,496	1%
Design	$155,013,538	$111,704,630	$267,463,426	$127,596,784	-52%
Visual	$61,324,030	$44,708,725	$33,478,485	$48,611,679	45%
Preservation	$60,588,442	$70,156,014	$28,630,392	$41,403,368	45%

Within each segment, we can examine the fluctuation of sales revenue in the past three years and use it as a rough proxy for growth. In the table on page 26, those businesses that had high sales revenue and a selection of others across the segments are examined.[15] All of the Culinary businesses examined have had large positive growth in sales revenue. On average, the top Culinary businesses, Restaurants, Catering, Confectionaries, and Mobile Food Vendors, had 26% growth in sales revenue in 2013 from the 2012 level.

Preservation contractors and businesses also have bounced back from 2012: Specialty Trade Contractors, Interior Designers, and Used Merchandise (mostly antiques) stores grew sales revenue 38% on average in 2013. Finally, Visual Arts and Crafts, particularly Art Dealers, made more sales in 2013 than in 2012. Art Dealer gross sales revenue is up 47% over 2012, with $47 million in sales in 2013.

LOCAL SALES TAXES PAID BY SEGMENT AND BUSINESS TYPE

The estimated total sales tax revenue for the City of New Orleans in 2013 is $163.4 million.[16] The $75.6 million in sales taxes from the cultural businesses in the city constitutes 44% of these revenues. Sales tax is the largest source of tax revenue for the general fund of the city. Cultural businesses are a crucial source of revenue for our city's services and overall economic health and development.

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[15] Business categories that had less than 20 businesses reporting sales revenue were excluded to protect privacy.
[16] From the 2012 New Orleans City Budget, available here: http://www.nola.gov/mayor/budget/.

Change in Gross Sales from 2010-2013 for Selected Cultural Businesses

Occupation Code - Description	2010 Gross Sales	2011 Gross Sales	2012 Gross Sales	2013 Gross Sales	% Change 2012-2013	Segment
Special Trade Contractors, All Other	$32,193,182	$41,279,969	$10,643,606	$15,840,313	49%	Preservation
Art Dealers	$59,859,468	$42,524,455	$32,208,230	$47,230,813	47%	Visual
Interior Design Services	$7,472,619	$7,512,909	$5,850,626	$7,956,154	36%	Preservation
Caterers	$19,838,950	$14,756,828	$5,587,865	$7,421,247	33%	Culinary
Used Merchandise Stores	$15,633,899	$16,873,911	$11,662,909	$15,107,130	30%	Preservation
Confectionary & Nut Stores	$11,976,030	$12,877,887	$9,842,258	$12,510,003	27%	Culinary
Restaurants	$1,228,650,913	$1,136,142,452	$915,557,205	$1,143,699,022	25%	Culinary
Mobile Food Services	$2,121,886	$2,184,590	$879,246	$1,047,767	19%	Culinary
Drinking Places (Alcoholic Beverages)	$289,606,540	$300,520,756	$273,413,038	$315,708,648	15%	Entertainment
Book Stores	$260,918,406	$288,299,447	$140,712,018	$141,510,570	1%	Literary

Local Sales Taxes Paid from 2010-2013 for Selected Cultural Businesses

Occupation Code - Description	2010 Sales Taxes	2011 Sales Taxes	2012 Sales Taxes	2013 Sales Taxes	Segment
Restaurants	$42,103,991	$47,056,538	$41,874,563	$51,863,517	Culinary
Drinking Places (Alcoholic Beverages)	$12,246,841	$12,928,111	$11,456,507	$13,230,021	Entertainment
Book Stores	$1,486,395	$1,314,195	$810,391	$747,714	Literary
Confectionary & Nut Stores	$500,693	$543,502	$408,242	$495,276	Culinary
Art Dealers	$364,912	$381,161	$294,605	$430,241	Visual
Caterers	$552,299	$381,488	$247,403	$313,868	Culinary
Interior Design Services	$197,601	$227,274	$155,969	$230,504	Preservation
Used Merchandise Stores	$329,550	$355,735	$198,872	$197,230	Preservation
Special Trade Contractors, All Other	$473,900	$1,140,419	$181,286	$183,545	Preservation
Mobile Food Services	$107,085	$111,399	$44,257	$52,022	Culinary

Of the $75.6 million in sales taxes that the cultural economy contributed to the City of New Orleans in 2012, 69% of those dollars came from Restaurants. Other top contributors include alcoholic beverage outlets featuring live entertainment ($13 million, or 17% of all cultural business sales tax revenue), and book stores, although that particular cultural business has been declining in the city and the country as a whole over the past five years or more.

Sales Taxes by Segment

Segment	2010	2011	2012	2013	% Change 2012-2013
Culinary	$48,177,935	$53,117,567	$46,480,159	$58,100,829	25%
Entertainment	$13,241,694	$14,155,469	$12,423,631	$14,913,480	20%
Preservation	$1,283,382	$2,064,376	$559,575	$729,519	30%
Literary	$1,508,182	$1,336,552	$831,094	$776,058	-7%
Design	$981,883	$886,374	$745,379	$606,431	-19%
Visual	$423,286	$449,292	$349,779	$489,577	40%

For the segments outside of Culinary, Entertainment, and Visual Arts, it is important to remember that much of that business income is not from sales tax, and therefore not reported in this chapter. Preservation and Design businesses tend to be service oriented, and not all services are taxed in Orleans

Parish. So there are many dollars being fed into the economy from these cultural businesses that do not show up in an analysis of gross sales revenue and sales tax.

Cultural Businesses Included in this Chapter

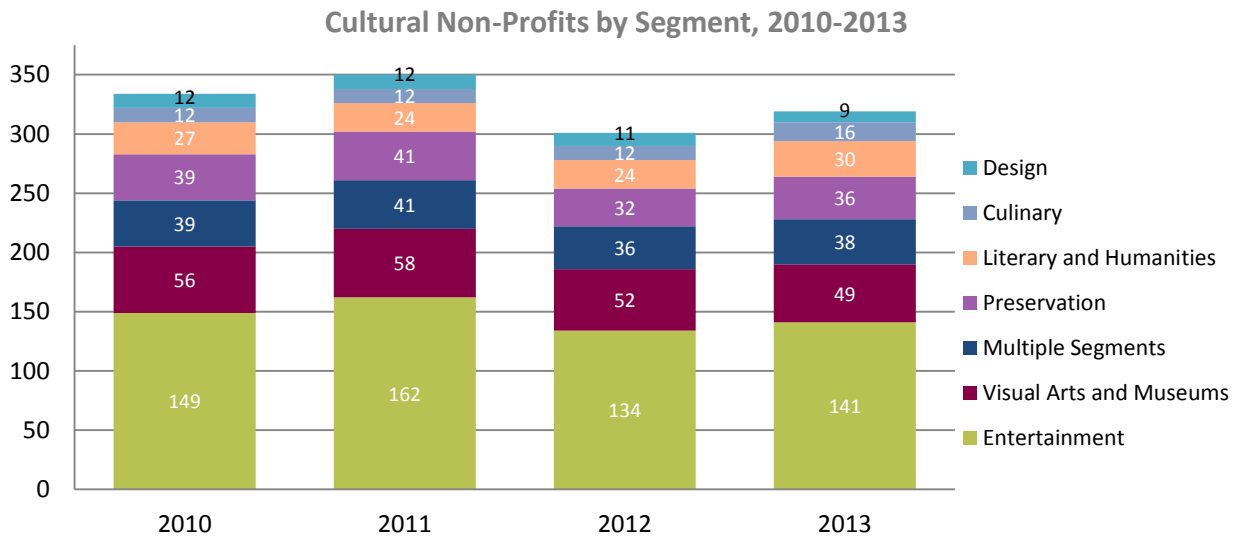
Description	Segment
Baked Goods Stores	Culinary
Bread Manufacturing	Culinary
Caterers	Culinary
Coffee & Tea Manufacturing	Culinary
Confectionery & Nut Stores	Culinary
Confectionery Wholesalers	Culinary
Dairy Product (except Dried or Canned) Wholesalers	Culinary
Dried & Dehydrated Food Manufacturing	Culinary
Fish & Seafood Markets	Culinary
Fish & Seafood Wholesalers	Culinary
Food Service Contractors	Culinary
Fresh Fruit & Vegetable Wholesalers	Culinary
Frozen Cakes, Pies and Other Pastries Manufacturing	Culinary
Fruit & Vegetable Markets	Culinary
Meat Markets	Culinary
Mobile Food Services	Culinary
Restaurants	Culinary
Seafood Canning	Culinary
Snack & Nonalcoholic Beverage Bars	Culinary
Specialty Food Stores, All Other	Culinary
Advertising Agencies	Design
Camera & Photographic Supplies Stores	Design
Commercial Photography	Design
Commercial Printing	Design
Commercial Screen Printing	Design
Computer Systems Design Services	Design
Custom Computer Programming Services	Design
Digital Printing	Design
Display Advertising	Design
Graphic Design Services	Design
News Dealers & Newsstands	Design
News Syndicates	Design
Newspaper Publishers	Design
Photography Studios, Portrait	Design
Public Relations Agencies	Design
Quick Printing	Design
Radio Networks	Design
Radio Stations	Design

Description	Segment
Specialized Design Services, Other	Design
Television Broadcasting	Design
Drinking Places (Alcoholic Beverages)	Entertainment
Formal Wear & Costume Rental	Entertainment
Motion Picture & Video Production	Entertainment
Motion Picture Theaters (except Drive-Ins)	Entertainment
Musical Groups & Artists	Entertainment
Musical Instrument & Supplies Stores	Entertainment
Performing Arts Companies, Other	Entertainment
Prerecorded Tape, CD & Record Stores	Entertainment
Promoters of Performing Arts, Sports & Similar Events	Entertainment
Reception hall rental or leasing	Entertainment
Theater Companies & Dinner Theaters	Entertainment
Theater Companies & Dinner Theaters	Entertainment
Book Publishers	Literary
Book Stores	Literary
Books Printing	Literary
Independent Artists, Writers & Performers	Literary
Publishers, All Other	Literary
Architectural Services	Preservation
Carpentry Contractors	Preservation
Drywall, Plastering, Acoustical and Insulation Contractors	Preservation
Glass & Glazing Contractors	Preservation
Historical Sites	Preservation
Interior Design Services	Preservation
Landscape Architectural Services	Preservation
Painting & Wall Covering Contractors	Preservation
Special Trade Contractors, All Other	Preservation
Tile, Marble, Terrazzo and Mosaic Contractors	Preservation
Used Merchandise Stores	Preservation
Art Dealers	Visual
Artist-Painting on Streets	Visual
Fine Arts Schools	Visual
Museums	Visual

ECONOMIC CONTRIBUTIONS OF THE CULTURAL ECONOMY

NON-PROFITS

In 2013, 319 non-profit[17] organizations were found using a combination of data sources that focus on culture, the arts, and/or the cultural economy. Compared to 2012, this is a 6% increase. During 2012, many active organizations either ceased to be active or lost all non-profit status (both state and federal), and were thus excluded from the data, but in 2013 more of these organizations managed to re-instate their status and file up-to-date financial and activity information, along with the founding of a few new organizations.[18]



Entertainment continues to be the most predominant segment for cultural non-profits in Orleans Parish (44%), and gained 5% in the number of organizations since 2012. Visual Arts and Museums remains in second place with 15% of non-profits. The Multiple Segments designation represents the 12% of cultural organizations that devote themselves, and almost all their programming, to two or more cultural economy segments. Examples include the Arts Council of New Orleans, the Contemporary Arts Center, and the New Orleans Center for the Creative Arts. The Literary and Humanities segment includes the Louisiana Endowment for the Humanities, headquartered in the city, and historical and literary societies that collect or preserve literature or other historical items, sites, or archives. The Design organizations are those focused on media, graphic design, fashion, or communications and have the smallest share of organizations overall at 3%.

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[17] Either 501(c)(3) or registered non-profit with the state of Louisiana

[18] In order to increase the accuracy of the non-profit data, all previous data was reevaluated, adding organizations that did not yet have financial information at the time of writing the *2012 Snapshot*.

OVERALL FINANCIALS OF CULTURAL NON-PROFITS IN 2012[19]

As in previous *Snapshots*, the revenue and assets of cultural non-profits were examined by segment to get a rough picture of cultural non-profit activity in New Orleans in 2012 and any significant changes from 2010.[20]

Revenue by Segment

Year	2010	2011	2012	% Change 2010-2012
Segment	**Total Revenue**			
Culinary	$5,276,541	$8,868,966	$6,982,871	32%
Design	$6,278,983	$6,105,428	$5,826,372	-7%
Entertainment	$67,687,866	$74,816,007	$68,414,784	1%
Literary and Humanities	$8,624,391	$8,898,532	$8,368,952	-3%
Multiple Segments	$17,018,029	$18,528,569	$15,087,662	-11%
Preservation	$16,027,639	$16,213,225	$15,284,115	-5%
Visual Arts and Museums	$92,718,086	$103,334,667	$106,509,401	15%
Totals	**$213,631,535**	**$236,765,394**	**$226,474,157**	**6%**
Medians	**$16,027,639**	**$16,213,225**	**$15,087,662**	
Averages	**$30,518,791**	**$33,823,628**	**$32,353,451**	

Overall, there was a 6% increase in revenue between 2010 and 2012. Several organizations in the Visual Arts and new Culinary non-profits contributed to this increase. In particular, the National World War II Museum continues to enjoy success with the public. However, other segments show significant drops in revenue, especially Literary and Multiple. Some of these organizations depend on grants or government revenue, which have become less available in recent years. Also, some of the larger Multiple segment organizations did not have 2012 financial data available at the time of publication, creating an artificial decrease that will be amended in future *Snapshots*.

Visual Arts and Museums receive the most revenue of all segments, again primarily due to museum admissions. While there are more Entertainment-oriented organizations, they do not seem to have as large of a revenue stream as museums, art schools, art centers, and other institutions included in the Visual Arts category.

2011 and 2012 were tough years for cultural non-profits, with most organizations showing a significant loss of assets. Entertainment experienced a 61% drop in assets from 2010, mostly due to the significant fluctuation in the number of active and designated non-profits in that segment, and thus the inconsistent financial reporting and maintenance of non-profit designations.

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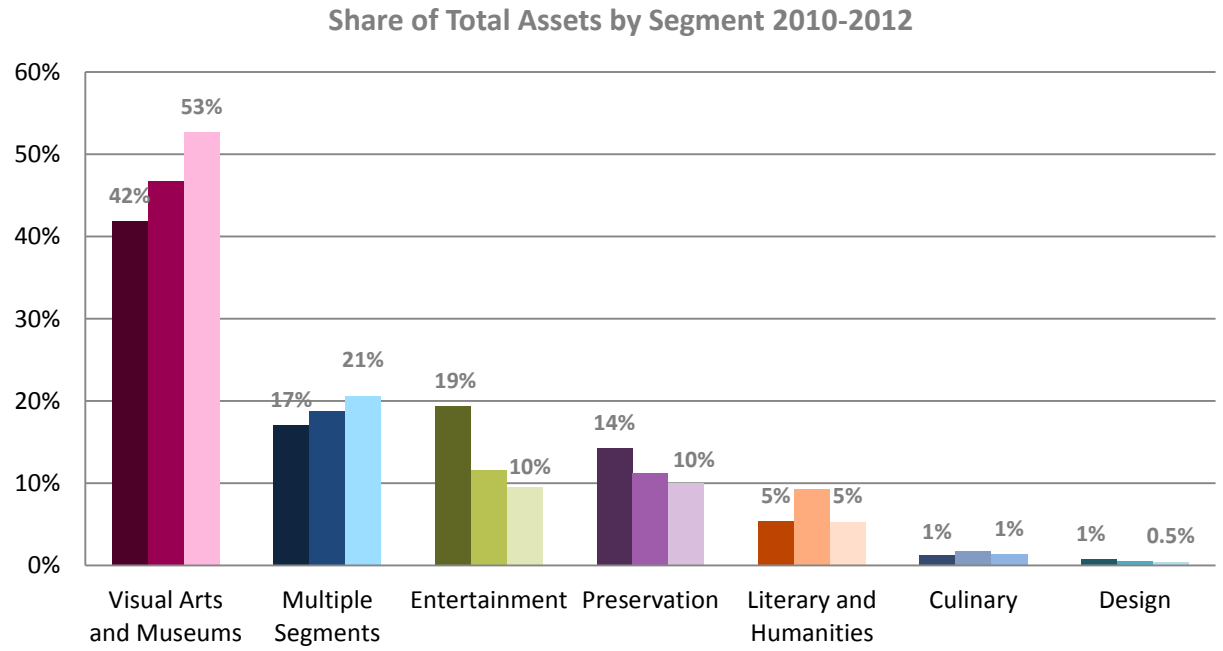
[19] Data comes from: GuideStar USA™, Mt. Auburn Associates, the Arts Council of New Orleans, and primary research by the Mayor's Office of Cultural Economy. Organizations in GuideStar and ACNO data that were determined to be inactive during 2012 were not included. However, these organizations may continue activity in 2013 or in later years; exclusion does not mean that the organization has been dissolved. Other organizations were excluded due to revocation of non-profit status by both the IRS and the Louisiana Secretary of State.

[20] 990 tax forms for 2012 were examined for 211 of the 319 non-profits or 66%, as these were all that had available 2012 forms. 104 of the 319 organizations were in good standing with the IRS and/or Sec. of State, but did not yet have a 2012 990 available. 4 organizations, while still active in 2012, have had their status revoked by the IRS or the Sec. of State for failure to file either a 990 or annual report.

Assets by Segment

Year	2010	2011	2012	% Change 2010-2012
Segment	Total Assets			
Culinary	$8,071,252	$9,675,256	$7,071,096	-12%
Design	$4,943,995	$3,033,071	$2,311,812	-53%
Entertainment	$120,941,496	$63,713,440	$47,073,414	-61%
Literary and Humanities	$33,432,050	$51,237,040	$26,363,597	-21%
Multiple Segments	$106,325,881	$103,746,759	$101,935,901	-4%
Preservation	$88,712,154	$62,318,419	$49,596,434	-44%
Visual Arts and Museums	$260,688,929	$257,909,086	$260,591,315	0%
Totals	**$623,115,757**	**$551,633,071**	**$450,306,769**	**-28%**
Medians	**$88,712,154**	**$62,318,419**	**$26,363,597**	
Averages	**$89,016,537**	**$78,804,724**	**$64,329,538**	

The Visual Arts and Museums category still had the majority of assets (53%) in 2012. Museums have significantly more assets than other organizations, including buildings and collections. Multiple segment organizations are second with 21% of assets. This segment also includes organizations that run art centers that have spaces and programming across segments. Entertainment, with 10% of assets, is mostly made of performing groups and festival producing organizations, neither of which invest in physical assets to the extent that Visual Arts and Museums do. Culinary has comparatively few assets to the other segments, but this is because most of its programs take place in temporary spaces and outdoors, or consist of funding for scholarships or training, eschewing the need for permanent facilities and equipment.



SEGMENTS OF THE CULTURAL ECONOMY: ENTERTAINMENT

FILM AND VIDEO

OVERVIEW OF FILM INCENTIVES AND FILM NEW ORLEANS

Film New Orleans (FNO) is the primary liaison between film and television productions and the City of New Orleans. FNO is responsible for marketing and attracting film and television related business for the purpose of economic development, for assisting productions with the permitting process and in connecting with local Crew and Resources, and for facilitating good communication between productions and the local community to strike a balance between film activity and quality of life.[21]

The city hosted 60 total feature film and television tax credit projects (each with local expenditures over $300,000) in 2013.[22] Local expenditures for these projects are estimated at $457 million for the New Orleans Region.[23] There were an estimated 192 smaller, non- tax credit projects for 2013 (with local expenditures under $300,000 each). As smaller films, these 192 films were responsible for an estimated $7.6 million in local expenditures. These projects range from student films and independent films to commercials and major network news and sports broadcasts. Overall, there were 252 projects with local expenditures of $464 million in 2013.

The state of Louisiana, through Louisiana Economic Development, offers a 30% transferable incentive for total in-state expenditures related to the production of a motion picture. An additional 5% labor incentive can be earned on the payroll of Louisiana residents that are employed by a state certified motion picture production. The incentives are fully transferable and Louisiana has no limit to the amount of incentives that can be earned by a single production. Only money spent on the production costs within the borders of the state of Louisiana will qualify for the 30% incentive. That includes all services that are performed in Louisiana from residents and non-residents alike. Productions have the option to transfer credits (incentives) to the state for $0.85 on the dollar.[24]

Louisiana, and New Orleans in particular, have become major players in the film industry. Of 108 live action films released by major United States studios in 2013, Louisiana ranked first as a primary location with 18 movies. California and Canada ranked second with 15 movies each. These 108 movies had production budgets of $71 million on average, and represent the year's top 50 grossing films.[25] The economic impact of the film industry driven by this tax credit program is examined in the Economic Impact section later in this chapter.

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[21] From Film New Orleans website: http://www.filmneworleans.org/
[22] Number of productions each year is calculated by counting the number of productions that start filming in the city during the year.
[23] Local expenditures each year is calculated by adding the local expenditures reported to the State by productions that complete filming in New Orleans during the year.
[24] From the Louisiana Office of Entertainment Industry Development website: http://louisianaentertainment.gov/index.php/film/why-shoot-here/incentives/
[25] From *2013 Feature Film Production Report*, by FilmL.A., Inc.

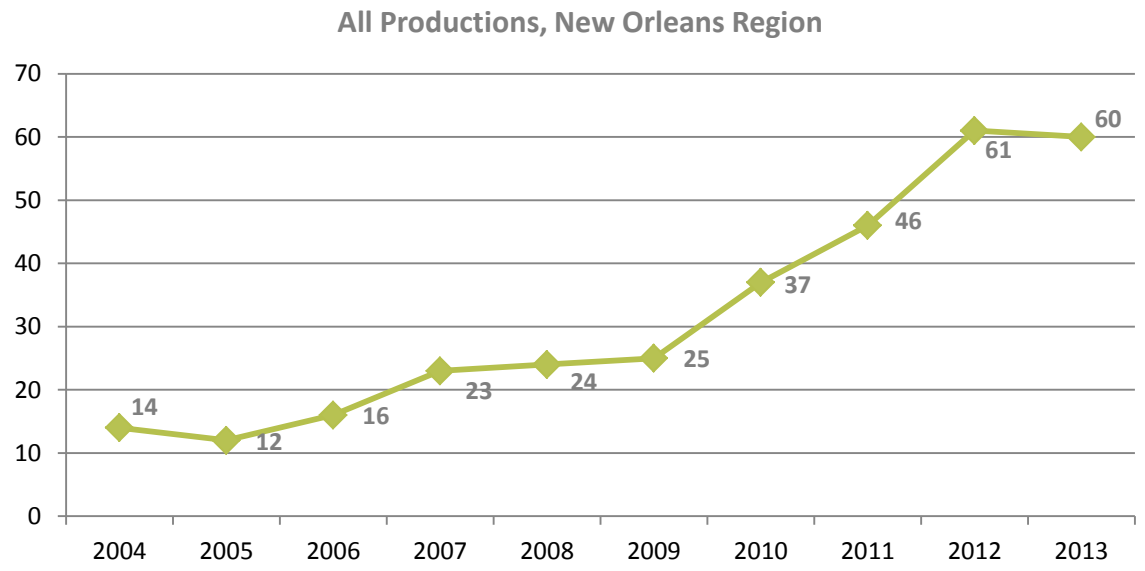
Major Film Projects 2013

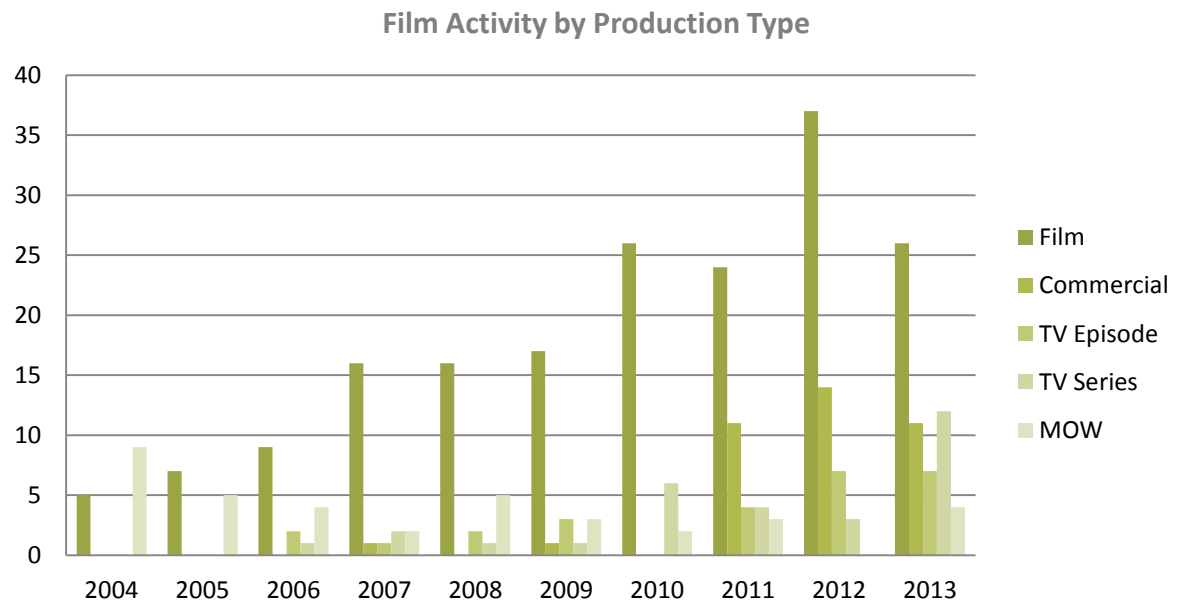
Project	Production Type
Dawn of the Planet of the Apes	Film
True Detective	TV Series
22 Jump Street	Film
American Horror Story: Coven	TV Series
Ravenswood	TV Series
Star-Crossed	TV Series
Grudge Match	Film
Focus	Film
Selfless	Film
When the Game Stands Tall	Film
Heat	Film
Treme Season 4	TV Series
Hot Tub Time Machine 2	Film
Kidnapping Freddy Heineken	Film
Top Chef Season 11	TV Series
Random (Kristy)	Film
Maggie	Film
Devil's Due (Unwanted)	Film
Elsa & Fred	Film
Black & White	Film
American Heist	Film
Remember Sunday	TV Movie
Direct TV Super Bowl	TV Episode
Reckless	TV Series
Second Sight	TV Movie
Ghosts (Jessabelle)	Film
Pitbulls & Parolees Season 5	TV Series
Occult	TV Movie
Oxygen	TV Episode
North of Hell	Film

Project	Production Type
Dermaphoria	Film
Flight Master	TV Series
Return to Sender	Film
The Talk	TV Series
Now You See Me	Film
The Originals	TV Series
Percy Jackson	Film
Refugio	Film
Bering Sea Beast	TV Movie
Stand Up Comedy Special	TV Episode
The Lookalike	Film
Kraft Mac & Cheese	Commercial
Latin Dream	Music Video
Una Vida	Film
America's Got Talent	TV Episode
VH1 at the Sugar Mill	TV Episode
Toyota "Staycation"	Commercial
Parallels	TV Series/Pilot
Jeep	Commercial
Bud Light	Commercial
Nordstrom Catalogue	Photo Shoot
Pocket Aces Pilot	TV Episode
Remax	Commercial
Direct TV	Commercial
Target	Commercial
Belvita	Commercial
Billy Connolly's Big Send Off	TV Episode
Buttercup Bill	Film
Popeye's	Commercial
2 Bedroom 1 Bath	Film

OVERALL FILM ACTIVITY

Since the introduction of the tax credits in 2002, New Orleans has seen steady growth in film and video productions spending over $300,000 in state. Although Hurricane Katrina in 2005 caused a low point of 12 productions, the numbers have been steadily rising. Louisiana remains third in film production in the United States after Los Angeles and New York City; as a result, New Orleans continues to attract feature films with large budgets of $30 million to as much as $200 million in many cases. The city also is home to several TV series, including *True Dectective* and *Ravenswood*. Television series and larger productions provide constant exposure for our unique locations and culture, use local businesses and services on a regular basis, and contribute to our economy, and employ local crew.





ECONOMIC IMPACT

When discussing the economic imapct of film activity, it is important to distunguish between the local impact and impact that is not circulated in the local economy. Local impact is when Films and other productions buy goods, services, hire local workers, pay taxes, permit fees and more. As the tax credit program has found its footing, New Orleans has experienced a significant increase in local spending of productions. In 2012, films spent over 4 times as much locally as they did in 2009. Explaining this increase are three factors: increase in film workforce, increase in post-production infrastructure, and positive experiences of major productions in the city. Local expenditures are the most direct impact on the local business community and the city's workforce.

But what are productions buying with this captial and how does it circulate in the local economy? As can be seen in the figure on the next page, when a production hires local workers and buys goods and services, this results in local and state taxes, and profits. Profits and taxes can then continue ciruculating in the economy to purchase more local goods and services or fund public projects and services.

In New Orleans from 2009-2011[26] 64% of the local expenditure went to payroll for Louisiana resident labor. Local wages have a strong economic impact, as many workers spend the vast majority of their paychecks locally buying groceries, clothes, and more. Other expenditures involved purchasing goods and services from local businesses: paying rent for stages, fees for permits, costumes, set pieces, and more. These businesses pay sales tax to the city and the state, and often use their profits locally as well.[27]

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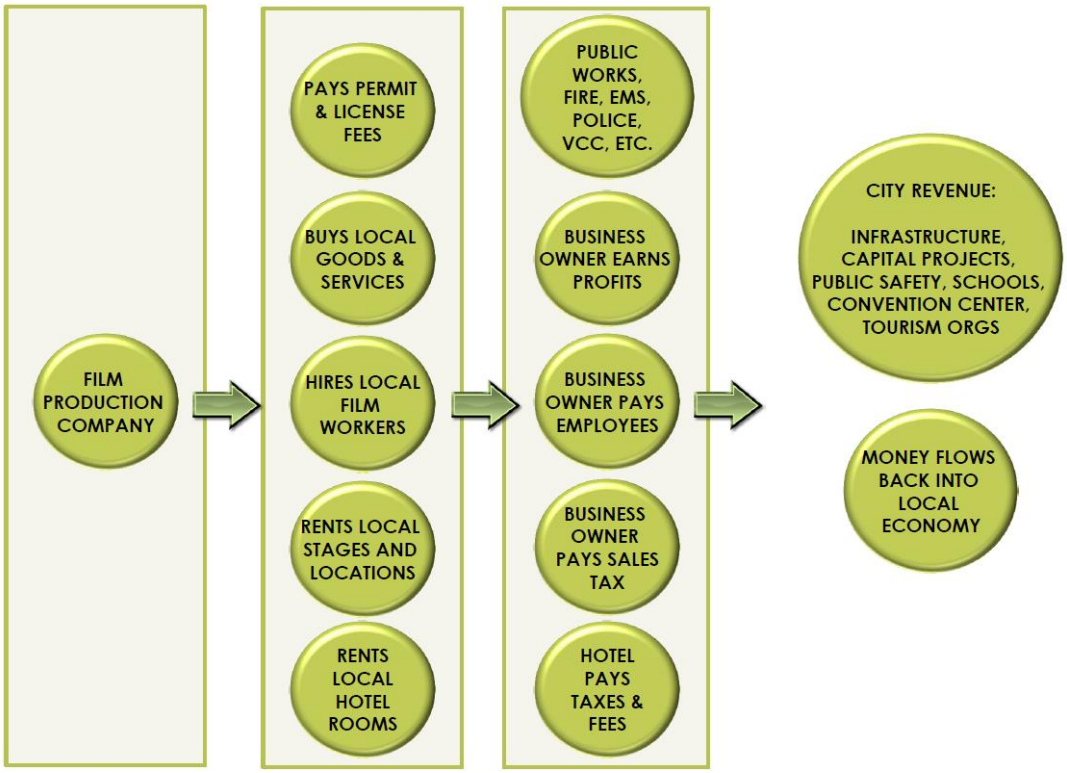
[26] Because of the lag-time of state certifications for film tax credits, which include the audits from which these numbers are calculated, 2012 and 2013 are not yet available.

[27] The sources used for this research include: Final audits submitted by each production to LED 2009-2012; Excel spreadsheets maintained by LED with both estimated and final reporting data from each production 2009-2012; Filming applications submitted to the Mayor's Office of Cultural Economy Film Office 2009-2012.

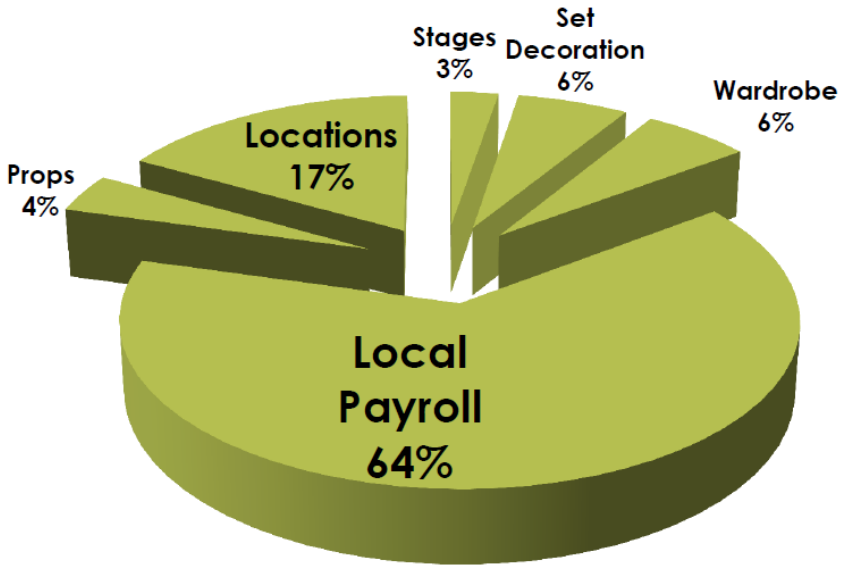
How Film Local Expenditures Impact the Local Economy



Sampling of Local Expenditures for New Orleans Films, 2009-2011

- **Payroll: $225 million**
- Includes local cast, crew, and extras
- **Locations: $58.7 million**
- Includes rental fees, permitting fees, office space
- **Stages: $9.3 million**
- **Set Decoration: $21.1 million**
- Includes furniture rental, greenery, set pieces
- **Wardrobe: $21.1 million**
- **Props: $13.7 million**

Where do films spend their money locally?



FILM WORKERS AND WORKFORCE DEVELOPMENT

Since the advent of tax incentive programs for the film industry in Louisiana in 2003, the number of workers in the film industry has significantly increased. Most work is contractual or temporary, however, and therefore difficult to measure through traditional data sources. The Employment chapter examined Entertainment jobs, which is not necessarily the same as workers since many workers in the industry may work 2 or 3 of these jobs/projects in a single year. When looking at only Film and Video jobs, there were an estimated 2,093[28] jobs in the film and motion picture-related categories. In order to get a rough estimate of film workers in the region, it is necessary to look at listings from the *2013-2014 Louisiana Entertainment Sourcebook*. Including actors, there are approximately 1,294 film workers in the New Orleans region in 2013, an increase of 17% over the 1,103 workers counted in 2012[29].

Estimated Film Workers in New Orleans Region, 2013

Art	**33 workers**	**Sets/Wardrobe**	**539 workers**
Art Directors		Art Department	
Art Designers		Boom Operators	
Title Artists		Buyers	
Set Designers		Construction	
Model Makers		Craft Services	
Camera/Visual/PR	**165 workers**	Electric	
Camera		First Aid	
Directors of Photography		Greens	
Camera Operators		Grips	
Visual Effects Supervisors		Locations	
Still Photographers		Paint/Scenic	
Publicists		Projection	
Special Effects & Stunts		Props	
Directors/Production/Managers	**193 workers**	Set Dressing	
Directors		Sound	
Assistant Directors		Video Assist	
Unit Productions Managers		Wardrobe	
Technical Coordinators		**Supervisors/HR**	**52 workers**
Location Managers		Script Supervisors	
Location Scouts		Production Accountants/Payroll	
Producers &Production Assistants		Production Office Coordinators	
Editors	**14 workers**	**Talent/Casting**	**30 workers**
Make-up and Hair	**67 workers**	**Transportation and Freight**	**74 workers**
Screenwriters & Composers	**19 workers**	**Actors**	**108 workers**
TOTAL EST. FILM WORKERS IN NEW ORLEANS REGION: 1,294			

[28] Source: ESMI, includes Actors, Producers and Directors, Camera Operators, Film and Video Editors, Media and Communication Equipment Workers, Costume Attendants, and Makeup Artists.

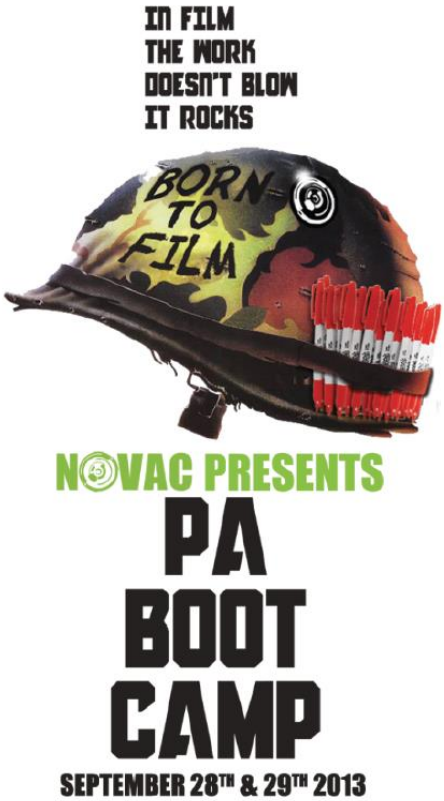
[29] The number of Actors from the *2012 Snapshot* has been revised from 903 to 104. 903 was actually the number of jobs for actors in that year. All corrections are reflected in this *2013 Snapshot*.

The Mayor's Office of Cultural Economy partners with local organizations to produce low-cost or no-cost film industry workforce training programs for individuals interested in working in New Orleans growing film industry. In 2013, the City partnered with local film industry businesses, Local Union IATSE 478, New Orleans Video Access Center (NOVAC), Jefferson Parish, St. Bernard Parish and the UNO Foundation to produce seven workforce training programs which trained a total of 82 individuals from the New Orleans region for jobs in the film industry.

The training programs included Intro to Grip and Electric; Practical Effects; two sessions of Film Production Accounting (depicted right); two sessions of Assistant Directing Intensives and P. A. Bootcamp (depicted below).

In 2013, the City's partner NOVAC placed 60% of the 82 participants in a paid job in film and/or television production. Of those participants, 15% were unemployed at the time of training and 27% had not previously qualified for paid work in the film/TV industry. Together, that 60% of participants landed 105 film/TV jobs that garnered $127,751.32 in wages. Hourly wages increased by 18%, with the highest hourly wage totaling at $26 and the highest day wage totaling at $550. Participants received employment on productions including *American Horror Story*, Spike Lee's *Oldboy, 22 Jump Street, Homefront, Pitch Perfect, True Detectives*, and *Top Chef* and worked for clients including Investigation Discovery, History Channel, WDSU, Proctor & Gamble, the Denver Nuggets, and more.

For all trainings, the City and NOVAC partners with local and national film businesses and practicing professionals to provide hands---on training to program participants. The Practical Effects workshop was led by Bob Willard, a special effects supervisor with over 40 film credits, and supported by crew from Spectrum FX, Louisiana's premiere special effects house. Spectrum FX provided facility and equipment for both the Practical Effects and Grip & Electric training. Production Assistant Bootcamp was led by instructors from Quixote, a national production studio renowned for providing film training across the country. Spectrum FX has employed several trainees to work in their shop and on productions, and many of the trainees have developed professional relationships with their instructors. Many program participants have also gone on to apply for and be awarded membership in the local International Alliance of Theatrical Stage Employees union (IATSE 478), which provides the training program with instructors and professional development.



SEGMENTS OF THE CULTURAL ECONOMY: ENTERTAINMENT

SOUND RECORDING

OVERVIEW OF LOUISIANA SOUND RECORDING INCENTIVES

The Sound Recording Investor Tax Credit was created with the Entertainment industry in mind. Much like Louisiana's highly successful film program, the sound recording incentive is designed to boost production in the state by reducing the cost of making new master music recordings whether distributed as a CD, a digital download, or part of the score or soundtrack of a film, commercial or videogame. The state offers a 25% refundable tax credit for local investments in sound recording and recorded music production projects.

Examples of eligible local expenses are:

- Studio rental and recording media (tape, CDs, hard drive);
- Engineer and session player fees;
- Hotels, meals and catering. [30]

SOUND RECORDING IN NEW ORLEANS

The cultural businesses research conducted by the Mayor's Office of Cultural Economy in 2011 found 17 recording studios in New Orleans and 21 in 2012. However, in 2013, only 10 commercial recording studios had active business licenses. There are now some non-profit recording studios and spaces available for rent, so the drop is not as precipitous as it seems.

As can been seen in the accompanying graphs, New Orleans is home to at least 50% of sound recording projects that qualify and apply for the Louisiana Sound Recoring Tax Credits since 2009.[31] The city has averaged 70% of projects since 2008. Sound Recording projects have spent a total of $1.7 million since 2008 locally, and provided 1,016 jobs. New Orleans has averaged 81% of all the jobs generated in the state each year, and 61% of all local expenditures.

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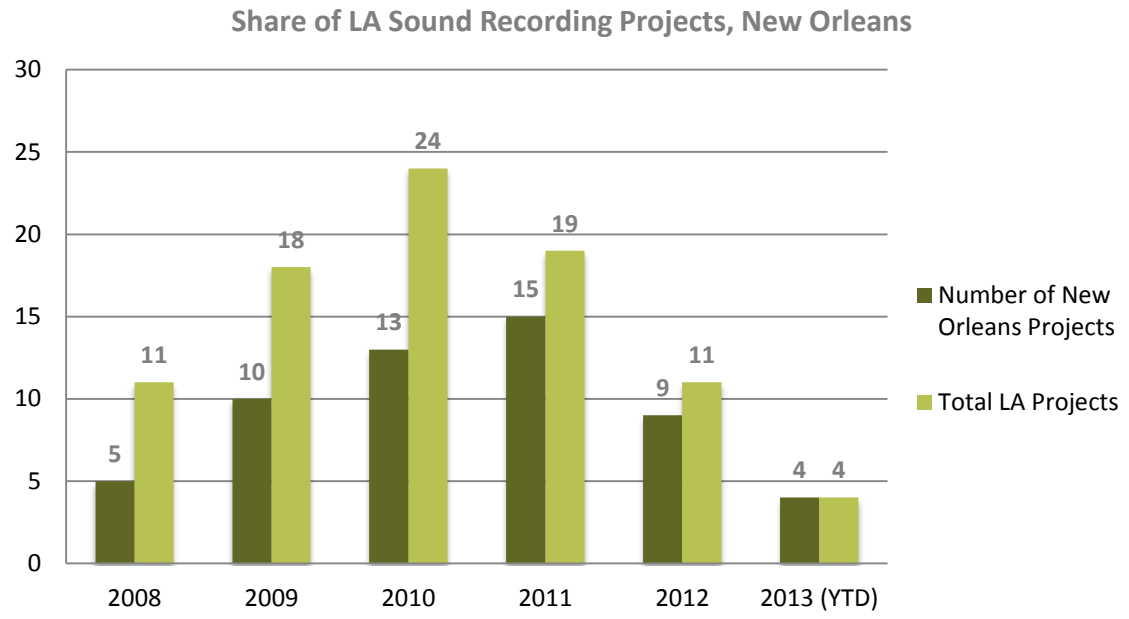
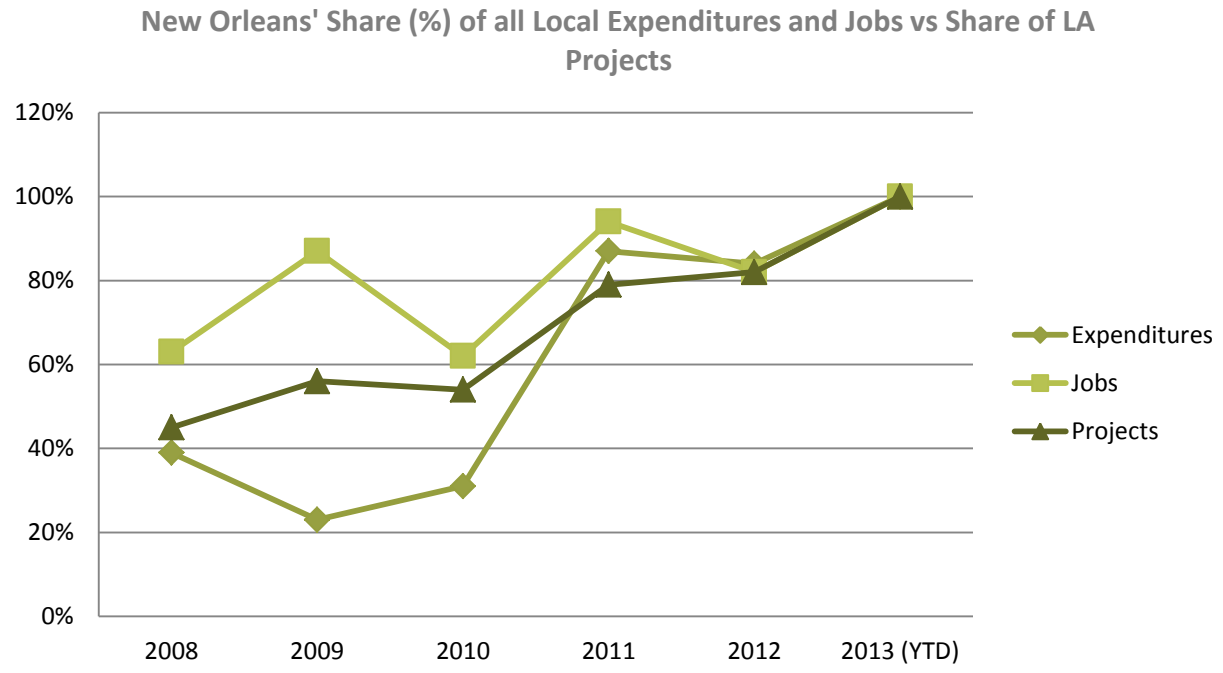
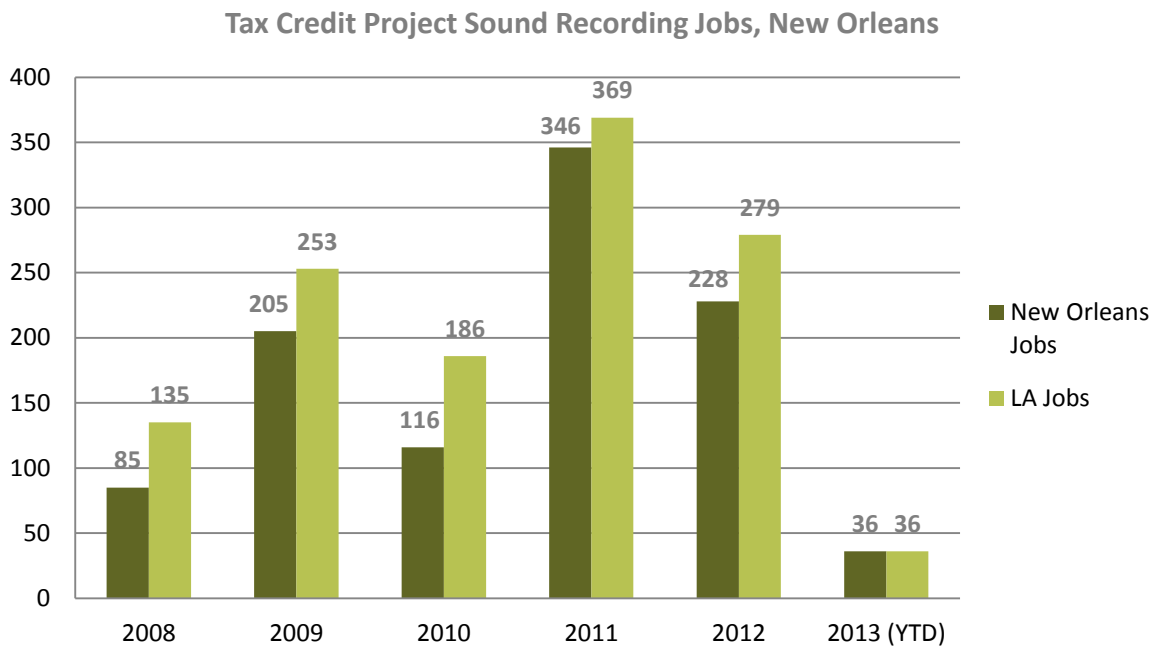
[30] From the Louisiana Office of Entertainment Industry Development website: http://louisianaentertainment.gov/index

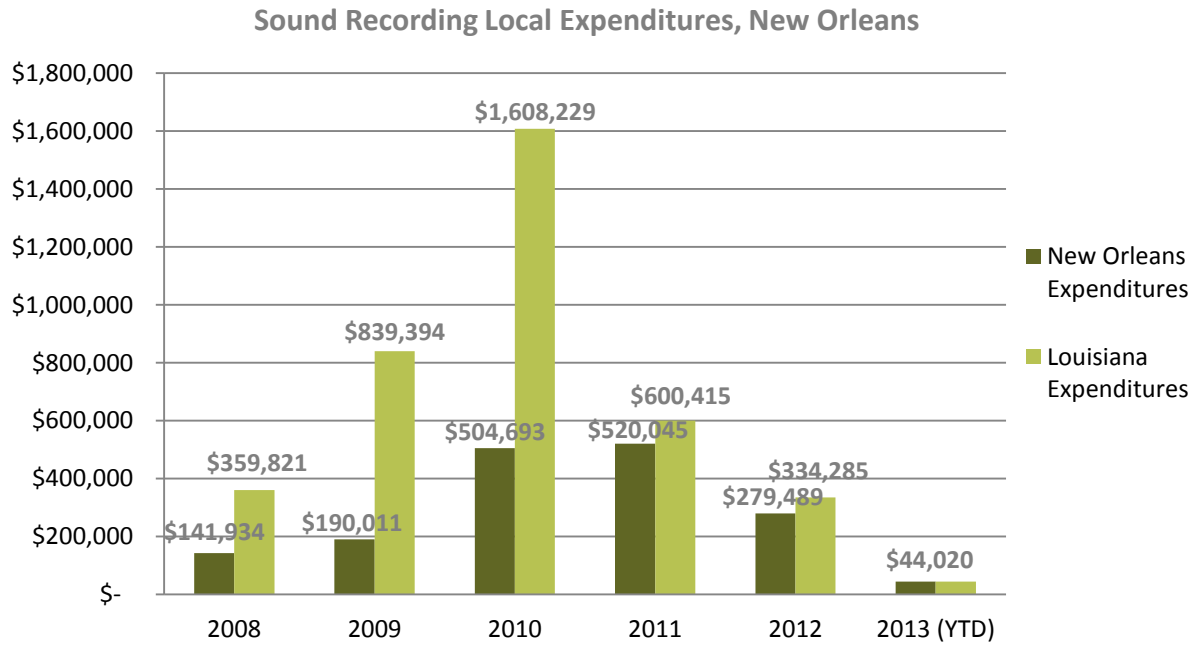
[31] For this survey, only projects that had been certified and have had credits paid out to applicants by the state were counted. Numbers from previous *Snapshots* were adjusted to these new parameters. Only those projects that could be reasonably found to have been done in the Orleans Parish borders were included.



The figure below demonstrates the descrepencies between the percentage of projects versus the percentages of jobs and local expenditure. New Orleans is netting a high percentage of projects and an even higher percentage of jobs compared to the rest of Louisiana, but its share of local spending lags behind. From 2008-2010, projects in New Orleans provided more jobs, but for much less local expenditure, meaning that these jobs most likely did not pay as highly as those for projects outside of Orleans Parish. 2011 turns around this trend, and in 2012 and 2013, all three match. However, as more projects from 2012 and 2013 are certified and paid out, it is quite possible for this trend to reverse itself.




Tax Credit Project Sound Recording Jobs, New Orleans
400
350
300
250
200
150
100
50
0
85
135
205
253
116
186
346
369
228
279
36
36
2008
2009
2010
2011
2012
2013 (YTD)
New Orleans Jobs
LA Jobs


Sound Recording Local Expenditures, New Orleans
$1,800,000
$1,600,000
$1,400,000
$1,200,000
$1,000,000
$800,000
$600,000
$400,000
$200,000
$-
$141,934
$359,821
$190,011
$839,394
$504,693
$1,608,229
$520,045
$600,415
$279,489
$334,285
$44,020
2008
2009
2010
2011
2012
2013 (YTD)
New Orleans Expenditures
Louisiana Expenditures

SEGMENTS OF THE CULTURAL ECONOMY: ENTERTAINMENT

LIVE THEATRICAL AND DANCE PERFORMANCES AND INFRASTRUCTURE

LIVE THEATRICAL PERFORMANCE IN NEW ORLEANS

New Orleans has a strong live performance infrastructure with over 18 venues.[32] These include the Mahalia Jackson Performing Arts Center, small neighborhood theatres in Uptown, the French Quarter and the Marigny, and performance facilities at local universities and the New Orleans Center for the Creative Arts. As noted in the section at the end of this chapter, the Saenger Theatre was completely restored and re-opened in September of 2013, and the Civic Theatre in downtown was also renovated and opened as multi-use concert, theatre, and film venue in mid-2013.

These venues play host to productions from all over the country as well as our local performing groups. The cultural business and non-profit research captured 34 active performing groups in theatre, comedy, music and dance in 2013.[33] These groups perform in local venues such as La Nuit Theatre uptown, Joy Theater, Ashé Cultural Center, local universities, and in the Warehouse District's Contemporary Arts Center and larger venues such as the Joy Theatre or the Mahalia Jackson Center for the Performing Arts.

In 2012, 10 local performing groups/venues were surveyed, and this year, 13 responded to our local economic impact questionnaire. A range of organizations answered the survey allowing us to look at small community theaters and larger theaters that host touring Broadway productions to better capture the full spectrum of live theatrical and dance activity in the city.

Local Performing Group & Venues Survey Results

Year	Productions	Performances	Employees	Attendance	Ticket Sales	Payroll	Local Expenditure
2012	99	276	645	24,525	$288,100	$290,755	$267,500
2013	115	386	1,128	41,265	$601,310	$1,125,190	$785,000

Of the surveyed organizations, 115 shows were produced in 2013 and these were performed 386 times. Half of the organizations put on 3 or less productions in 2013. Sales reached $600,000 in 2013 for the surveyed organizations. Because some of our largest theatre venues did not answer this year's survey, the true amount would likely be much more, by millions of dollars. Annual attendance totaled 41,265; a number that would likely be many times larger if more of the major venues had responded.

However, among these smaller organizations, there has been a large increase in every area studied since 2012. Attendance almost doubled even though only 3 more mid-size respondents were added and

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[32] Venues counted are for theatre and larger concerts. For small music venues and drinking places that feature music, see the Music and Social Aid and Pleasure Clubs chapter.
[33] Not including independent musicians and bands that play small venues and may or may not be formally organized, see the Music and Social Aid and Pleasure Clubs chapter.

ticket sales doubled. Payroll was three times as high in 2013 ($1.1 million vs. $291,000 in 2012) for less than double the employees in 2012 (1,100 vs. 650 in 2012). Overall, the independent and mid-size theater scene in New Orleans is thriving and recovering from post-2005 lows.

OVERVIEW OF LOUISIANA LIVE PERFORMANCE PRODUCTION INCENTIVES

The Live Performance Production Incentives allow up to a 25% transferable tax credit for investments made in theatrical and concert productions. An additional 10% tax credit for payroll expenditures to Louisiana residents is also available. A transferable tax credit can be sold or applied against Louisiana tax liability. Tax credits may be earned on a single production for a period of 2 years or a series of productions which take place over a 12-month period. To qualify for the Live Performance Tax Credits, applicants must spend a minimum of $100,000 in Louisiana.[34]

LIVE PERFORMANCE PRODUCTION TAX CREDIT PROJECTS IN NEW ORLEANS

As in film production, New Orleans has a natural advantage in attracting live entertainment productions. As Louisiana's top tourist destination, it has the visitor draw to attract large productions from around the world. With its unique culture, New Orleans will continue to be home to local creative performance groups in theatre, dance, and music.

New Orleans benefits greatly from the live performance tax credits. From 2008-2013, the city was the location for 85% of the projects.[35] As can be seen in the table below, New Orleans has benefitted from over $11 million in local expenditure and over 1,300 jobs over the past 6 years. As more projects from 2012 and 2013 complete the certification process, expect to see those years increase in benefits for the city in future *Snapshots*.

Live Performance Tax Credit Projects in New Orleans

Year	Productions	Expenditures	Payroll	Jobs
2008	1	$21,081	None Filed	60
2009	4	$1,881,531	$300,730	167
2010	8	$4,164,029	$532,067	566
2011	6	$4,696,239	$362,363	454
2012	2	$15,276	None Filed	47
2013 (YTD)	1	$541,782	$348,568	75
Totals	**22**	**$11,319,938**	**$1,543,728**	**1,369**

OVERVIEW OF LOUISIANA LIVE PERFORMANCE INFRASTRUCTURE INCENTIVES

The Live Performance Infrastructure Incentives are very similar to the Production Incentives. There is also a $100,000 minimum local, in-state investment in a theatre or performance space structure or renovation. Project investors can receive up to a 25% tax credit for the investment is available for

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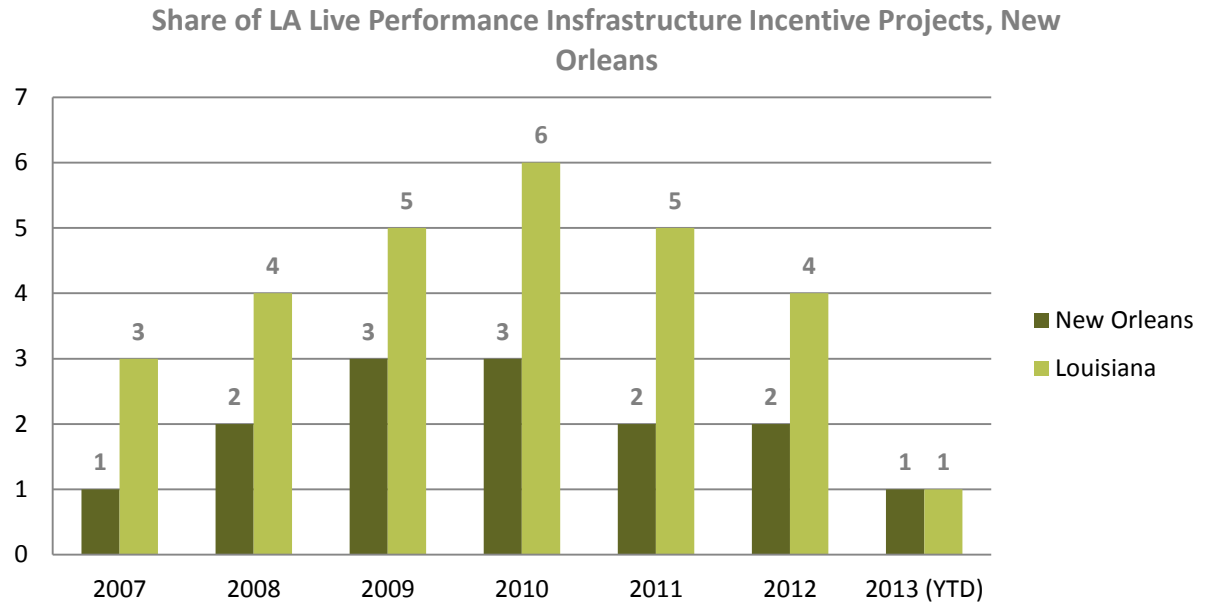
[34] From the Louisiana Office of Entertainment Industry Development website: http://louisianaentertainment.gov/index.
[35] Only certified projects that had received some or all credits from the State of Louisiana were included in this data set. Data from previous *Snapshot* publications was adjusted to reflect the final numbers. A number of productions that applied and were initially certified in previous years did not end up receiving tax credits and had to be excluded.

projects over $1,000,000 in local expenditures. This incentive also has a 10% Louisiana resident payroll tax credit. Until the end of 2014, all theater infrastructure projects are eligible for the incentive program, but after 2014, only projects that take place on the campuses or property of universities, colleges, or other higher education institutions will be eligible. This change will drastically reduce the impact of the incentive program for live performance infrastructure in New Orleans.[36]

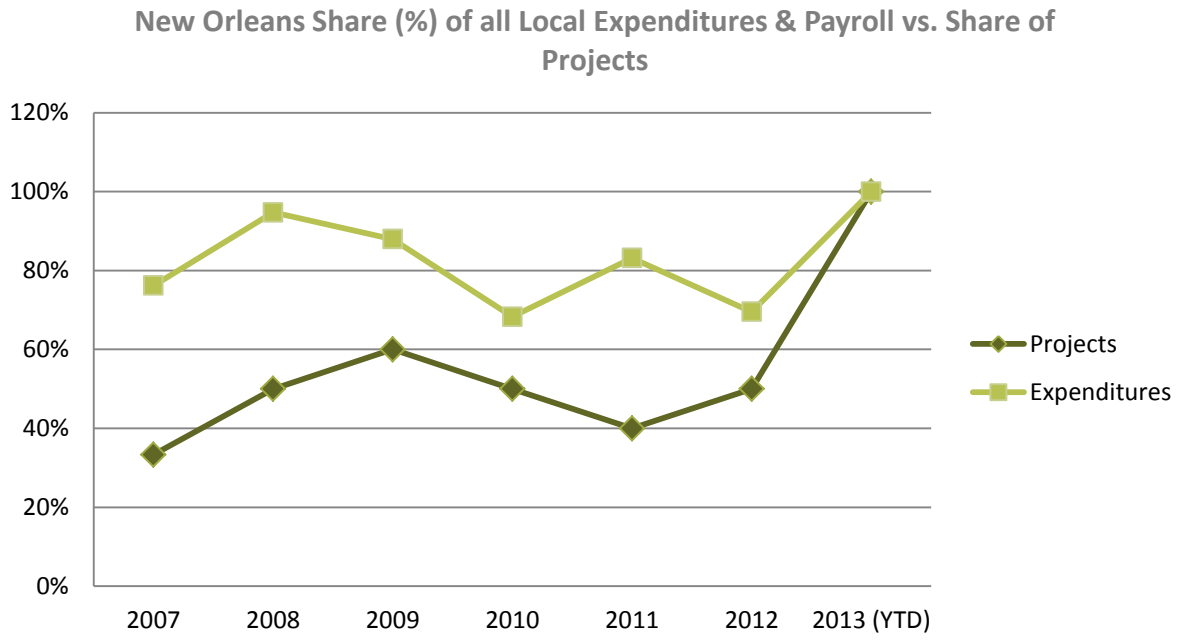
LIVE PERFORMANCE INFRASTRUCTURE TAX CREDIT PROJECTS IN NEW ORLEANS

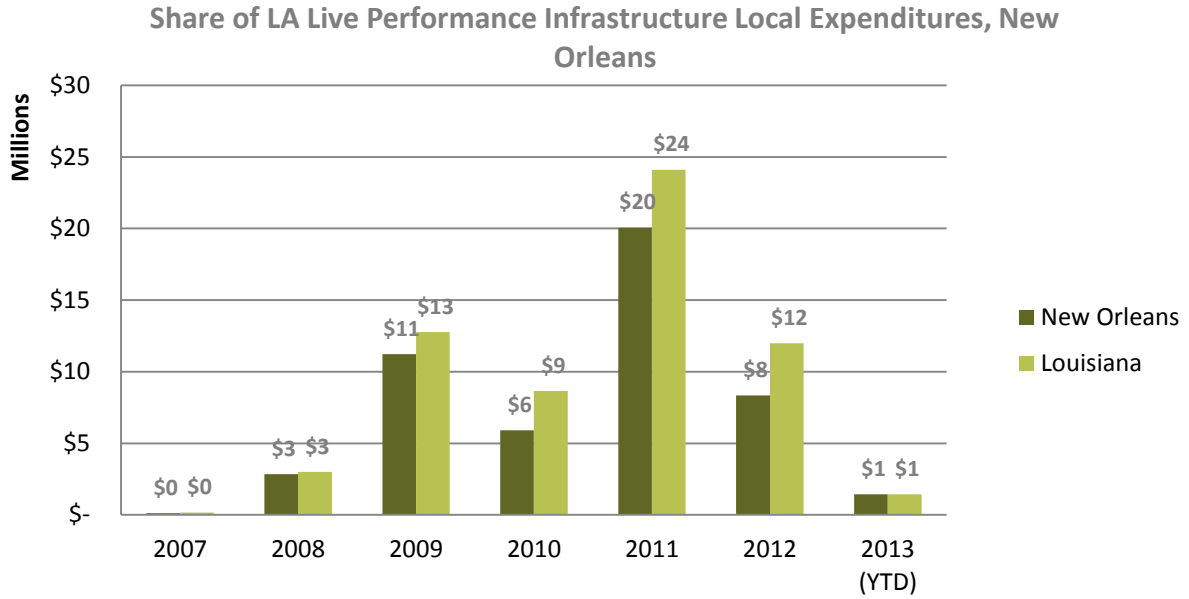
Because of its extensive existing theatrical venue infrastructure, New Orleans has had plenty of investment in restoring both grand venues like the Saenger Theatre and smaller community-based venues like the Ellis Marsalis Center for Music in the Upper Ninth Ward. Since 2007, New Orleans has averaged 55% of all projects in the state in any given year.



But the size of the recent investment in New Orleans live performance infrastructure is really demonstrated by the local expenditure of these projects. In any given year since 2007, New Orleans averaged 83% of local expenditures of all productions in the state, representing much larger and more expensive projects. In total, $50 million was spent locally in New Orleans, or 81% of all local expenditure for the program for the entire state. Over $3 million was paid to workers in New Orleans' projects, or 90% of all payroll expenditures for all projects in the state from 2007 to 2013.

[36] From the Louisiana Office of Entertainment Industry Development website: http://louisianaentertainment.gov/index.





RENOVATION OF THE SAENGER THEATRE

In September of 2013, the Saenger Theatre on Canal Street re-opened after a $52 million renovation. Built in 1927 by noted New Orleans architect Emile Weil, the Saenger Theatre is a remarkable example of Italian Renaissance architecture and listed on the National Register of Historic Places. The building was significantly damaged by Hurricane Katrina and has since been the focus of complex redevelopment through a public-private partnership between the City of New Orleans, Canal Street Development Corporation, and ACE Theatrical Group.

"The Saenger Theatre is once again the crown jewel of Canal Street and its rebirth is a significant moment in New Orleans' continuing recovery from Hurricane Katrina," Mayor Mitch Landrieu said. "This newly restored, iconic stage house is both essential to our cultural identity and serves as a symbol of how we are building back better than before. Combined with new state-of-the-art features and the authentic restoration to its original 1927 design, the new Saenger Theatre will redefine the live entertainment marketplace in New Orleans and the Gulf Coast region. Audiences will be as amazed by the fully restored theatre's fine attention to detail as they are to the world class acts it will attract."

The Saenger Theatre has been meticulously restored to its original, 1927 grandeur with historically replicated carpet, original and replicated chandeliers, and a historically accurate paint scheme. Modern technical upgrades, including new fiber optic stars in the auditorium and expanded restroom and concession facilities make the theatre a state-of-the-art live entertainment venue. Years of paint and veneer have been stripped away inside the theatre and the original color palette has been restored. Architects have worked to recreate the theatre's original interior look and feel, including the decorative elements and ornamentation, windows and doors, light fixtures and poster boxes. The stage house has been expanded, allowing for larger productions and a wide range of programs. The Saenger Theatre reopens with a seating capacity of approximately 2,600.[37]

[37] City of New Orleans, Office of Communications. 2013. City celebrates return of iconic Saenger Theatre to downtown New Orleans [Press release]. Retrieved from http://www.nola.gov/mayor/press-releases/2013/20130927-saenger-reopens/

SEGMENTS OF THE CULTURAL ECONOMY: ENTERTAINMENT

MUSIC AND SOCIAL AID AND PLEASURE CLUBS

MUSIC PERFORMANCES AND ECONOMIC IMPACT

In the Businesses chapter, this survey found that 54% (117) of Entertainment businesses are live music venues in 2013, a 6% increase from 2012. Of all the drinking establishments in the city, we estimate that 24% have live music or DJs regularly. These are the bars and clubs that host local musicians multiple weekdays and weekends. To get an idea of how these venues and an estimated 4,000 individual musicians impact our economy, this survey looks at gig data. The Mayor's Office of Cultural Economy has compiled data on the number of gigs per year by venue and differences in those offerings by month, weekday/weekend, and festival days.

MUSIC GIGS

Examining the frequency and timing of live music gigs in New Orleans in 2013 will give us more information on what work is available to local musicians and how large events, particularly music festivals, effect the number of gigs. There were 29,236 music gigs last year, 2% less than in 2012. The variance is small and until further years are counted, there is no way to know if 29,700 in 2012 was a peak or a new average for years to come.

The 2013 data shows a small difference, about 6% more gigs, between high volume tourism months (busy) and lower volume months (slow). This is smaller than the 2012 difference of 10%. For the fourth year in a row, the difference between tourism seasons seems to be negligible when compared to days of the week and especially festival days.

When we examine the average local music gigs per day, it can tell us what effect weekends[38] and special events have on performance opportunities for musicians. Festivals have a large impact on the average number of gigs that are not related to the festival (24% more gigs on average on a festival day as opposed to an average day). Festivals taking place in the city tend to increase gigs on week days and any given day overall.

The impact of festivals and events then, particularly music festivals, is positive on the number of local live music gigs in the city and therefore for performance opportunities for local musicians. Of course, some festivals bring in large numbers of regional and national visitors and can be related to tourism.

But it would appear that the busy tourism season has less of an impact on gigs than music-related events. The events that most positively affect gigs are those that take place near live music venues, such as French Quarter Festival. It makes sense that venues at or near a festival location book more musicians during the festival to capitalize from the presence of a potentially larger audience.

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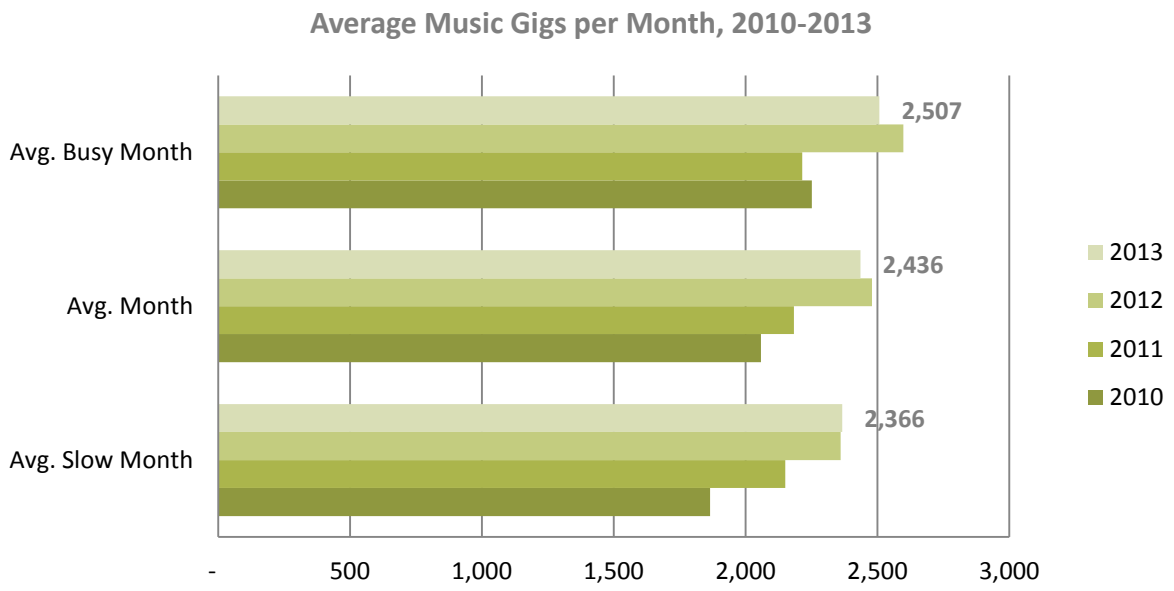
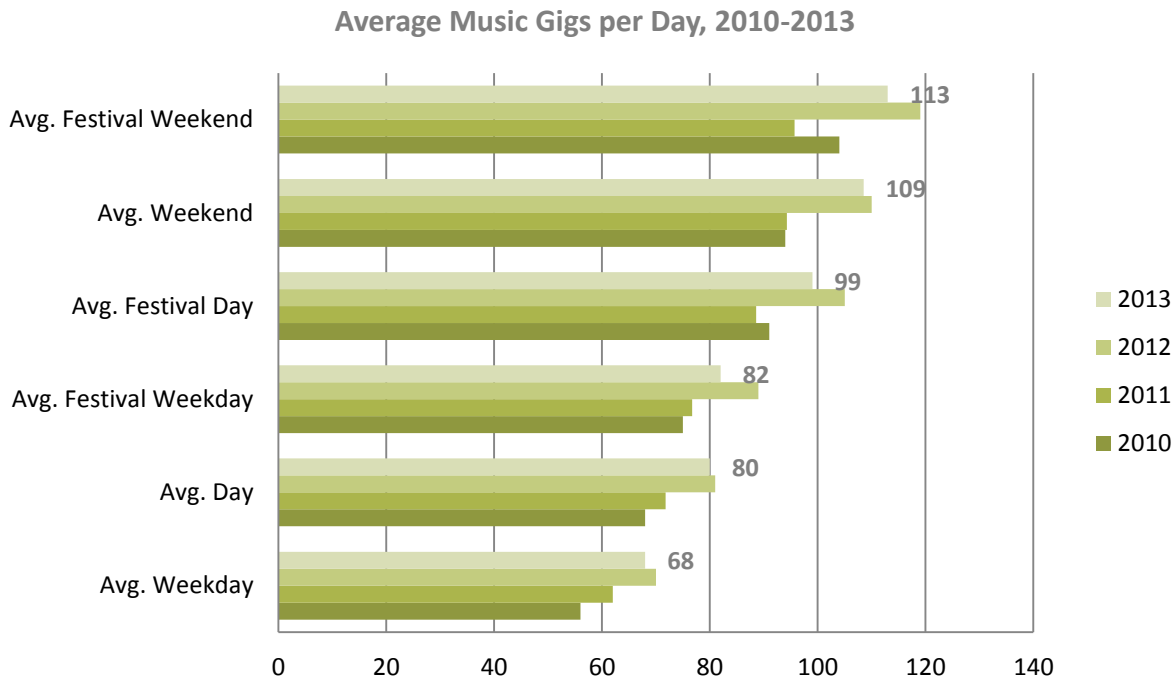
[38] Weekends in this data refers to Friday and Saturday gigs, most of which take place in the evenings. Weekdays refers to Sunday through Thursday gigs, again, most of which take place in the evening.





During the rare times when a major festival or event is not taking place in New Orleans, gigs tend to concentrate on the weekends and drop off sharply during the week. An average weekend day has 109 performances and an average weekday only 68 or 38% less than weekends. This concentration is not solely due to an increase in the number of venues offering live music on Fridays and Saturdays, although that is certainly the case, but also to an increase in multiple gigs at single venues. So a bar that only features one band on Wednesdays and Thursdays may feature anywhere from 2 to 5 on a weekend, increasing the number of gigs on that night.

Live Musical Gigs per Day 2013[1]

Month	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	Totals Month	Totals Sun-Thurs	Totals Fri-Sat
January	43	56	62	96	86	62	42	46	68	76	94	94	63	51	58	68	79	104	95	68	53	52	79	78	95	92	73	53	43	76	96	2201	1445	756
February	113	116	58	45	60	78	83	117	112	95	103	59	63	81	101	95	84	46	55	74	80	108	110	73	50	58	72	75				2264	1392	872
March	89	90	67	42	56	75	80	98	124	87	75	71	80	85	108	116	95	67	66	86	87	109	113	80	48	57	73	86	111	111	74	2606	1537	1069
April	42	52	58	83	109	116	72	51	58	74	107	112	123	91	53	64	81	112	120	119	77	54	70	76	124	137	152	111	95	97		2690	1702	988
May	111	107	129	120	86	41	44	49	74	85	109	66	32	55	58	73	95	81	62	37	52	61	82	99	101	73	39	53	61	91	97	2323	1407	916
June	114	85	51	56	74	91	126	107	91	50	64	80	107	114	115	76	53	62	81	100	128	116	77	56	65	83	97	125	113	91		2648	1590	1058
July	46	49	55	70	91	97	61	48	53	63	85	119	116	66	41	45	67	84	111	119	69	53	54	68	83	113	109	70	57	57	63	2282	1407	875
August	77	104	113	70	57	58	71	75	94	111	62	51	63	65	86	96	107	66	53	63	65	83	105	122	73	48	66	69	80	101	109	2463	1401	1062
September	60	47	51	73	86	94	113	77	53	61	73	103	132	116	78	60	61	86	94	117	121	85	56	71	87	97	115	122	86	52		2527	1597	930
October	54	71	93	110	119	70	58	52	77	89	112	115	67	57	65	79	98	122	127	80	59	66	84	92	121	102	69	60	71	97	97	2633	1705	928
November	104	107	61	59	60	68	83	115	113	67	62	70	73	93	99	111	65	56	62	72	79	117	99	74	54	59	72	40	81	80		2355	1329	1026
December	59	38	49	67	78	101	105	55	50	61	73	94	113	122	72	50	60	70	90	100	97	74	52	36	28	70	97	87	63	55	78	2244	1422	822
Totals																																29236	17934	11302

- Slow Months
- Fridays and Saturdays
- Super Bowl
- Mardi Gras
- Congo Square Rhythms Festival
- French Quarter Festival
- Jazz and Heritage Festival
- Bayou Boogaloo
- Cajun Zydeco Festival
- Essence Festival
- Satchmo Summerfest
- Crescent City Blues and BBQ Festival
- VooDoo Music Experience
- Treme Creole Gumbo Festival
- New Year's Eve

[1] Music Gig data is from WWOZ Livewire Music Calendar Archives; http://www.wwoz.org/new+orleans+community/music+calendar

SOCIAL AID AND PLEASURE CLUBS

Social Aid and Pleasure Clubs (SAPCs) are organizations, both formal and informal, that promote the traditional culture and heritage of the second line and also provide services and/or programs to their communities. A list of Second Line Parades in 2013 appears at the end of this chapter, 36 parading clubs in all. The parading season actually is from September through June, so the chart below is showing the end of one parading season in June 2013 and the first half of the 2013-2014 season.

SAPCs are complex neighborhood-based organizations with a rich history and living present. While best known in the general public for their spectacular annual anniversary parades (commonly referred to as "Second Lines"), these clubs are active at all times, holding fundraisers, parties, funeral second lines, balls, and assisting club and non-club members in their communities.

Each parade includes about 2,000-5,000 participants. It is difficult to "watch" a second line, instead, the "parade" is often a massive procession, headed by a brass band and club members, joined by almost everyone attending, and also including small motorcades honoring living and deceased members. The parades take place throughout the city during the season, but are commonly found in neighborhoods that are not tourist areas.[39]

[39] Paraphrased from: Regis, Helen. 2001. "Blackness and the Politics of Memory in the New Orleans Second Line". *American Ethnologist* 28(4):752-777

Date	Social Aid and Pleasure Club
1/19/2013	Perfect Gentlemen
1/19/2013	Men of Unity and the Original Steppers
1/20/2013	Undefeated Divas and Gents
2/16/2013	Lady Jetsetters
2/24/2013	CTC Steppers
3/3/2013	VIP Ladies and Kids
3/10/2013	Keep-N-It Real
3/24/2013	Revolution
3/31/2013	Original Men Pigeon Town Steppers and Ladies Pigeon Town Steppers
4/19/2013	Old & Nu Style Fellas
5/10/2013	Original Big Seven
5/26/2013	Money Wasters
6/1/2013	Original Big Seven
6/2/2013	Single Ladies and Single Men
6/16/2013	Perfect Gentlemen
8/25/2013	Valley of the Silent Men
9/8/2013	Young Men Olympian Jr.
9/22/2013	Young Men Olympian Jr.
10/6/2013	Family Ties
10/10/2013	Prince of Wales and Lady Wales
10/27/2013	Original Four
11/10/2013	Sudan
11/10/2013	Versatile Ladies of Style
11/17/2013	Nine Times with Lady Nine Times and Nine Superior Ladies
11/24/2013	Original N.O. Lady Buckjumpers, Jr. Buckjumpers & Men Buckjumpers
12/1/2013	Dumaine St. Gang with Ladies Auxiliary & Original Dumaine St. Trolley Division
12/1/2013	Westbank Steppers
12/8/2013	New Generation
12/15/2013	Big Nine
12/22/2013	Women of Class and Sportsman's Ladies
12/29/2013	Lady Rollers

FESTIVALS AND EVENTS

OVERVIEW

In New Orleans, festivals are a way of life. With 136 festivals, events, and outdoor markets, New Orleans has more festivals than weekend days in the year. While many of these events primarily feature a single part of our local cultural economy such as performing arts, food, or visual art, almost all festivals and even farmers and art markets include a combination of all three or more aspects of New Orleans cultural life.

Harrison Avenue Marketplace features food, music, culinary demonstrations, art and more. Large music events such as the French Quarter Festival have both 20 stages for music and gourmet food stands from local restaurants. In fact, the food vendors and menu offerings are listed and dissected in local papers as much as the music. The Jazz and Heritage Festival also features an exclusive crafts and art market, selling local artists', sculptors', and jewelry designers' wares. In recent years, other large music festivals such as Essence Music Festival and VooDoo Experience have also added art marketplaces to their events as well as local food vendors.

Every event in New Orleans is unique, from an annual neighborhood festival such as the Mirliton Festival in the Marigny to the citywide celebration of Mardi Gras. This chapter will provide an overview and listing of many of the annual festivals here in New Orleans, starting with the types of festivals that took place in 2013 and an estimate of attendance for all 136 festivals included in this year's Snapshot. Using commissioned economic impact studies, we will then examine major events and their economic and tourism impacts. Finally, we will present the results of the second New Orleans Festival and Event Survey. This survey was designed to measure the local economic impact of events on employees, culinary workers, musicians, and more.

FESTIVAL OVERVIEW BY CULTURAL ECONOMY SEGMENT

Of the festivals and recurring markets surveyed here[40] music festivals are the most common; 25% of the 136 festivals were categorized as musical festivals. Again, it is important to remember that most of these events feature more than one category, the most common combination being food and music. Visual Arts also are often featured at events through art markets. Events were categorized by their dominant characteristic. So although Jazz Fest features food and visual art in addition to music, its primary purpose is music. The New Orleans Po-Boy Festival on Oak Street has music and visual art vendors, but its focus is the multitude of food vendors serving New Orleans' most famous sandwich and is thus categorized as a culinary festival.

Culinary (21%), Cultural and Ethnic (12%), and Film, Theatre, and Dance (12%) are the next most common types of festivals. Cultural and Ethnic festivals include the many events celebrating New

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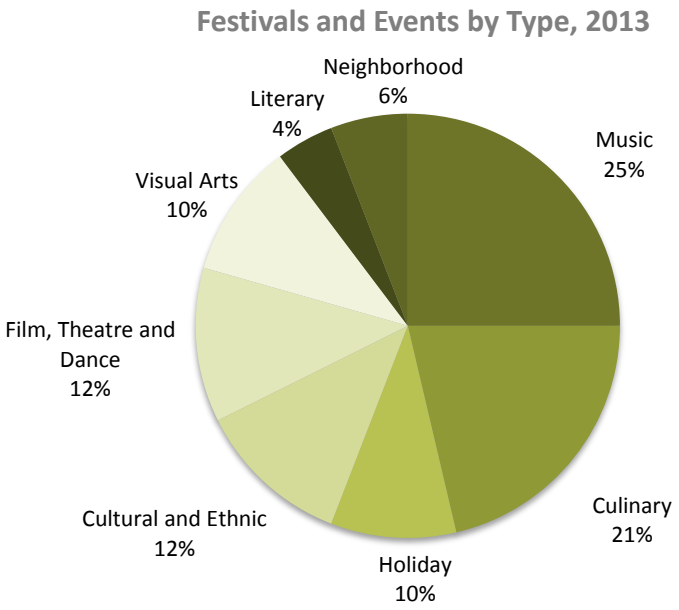
[40] Festival data was acquired through primary internet research, using existing material from the *2010-2012 Snapshots,* and using search engines. New festivals were included to the extent possible. Some festivals that are small in size or are not recurring festivals may not be included.

Orleans' African, Native American, Caribbean, French, Spanish, Latin American, Italian, Cajun, and Irish heritage and current culture and populations.



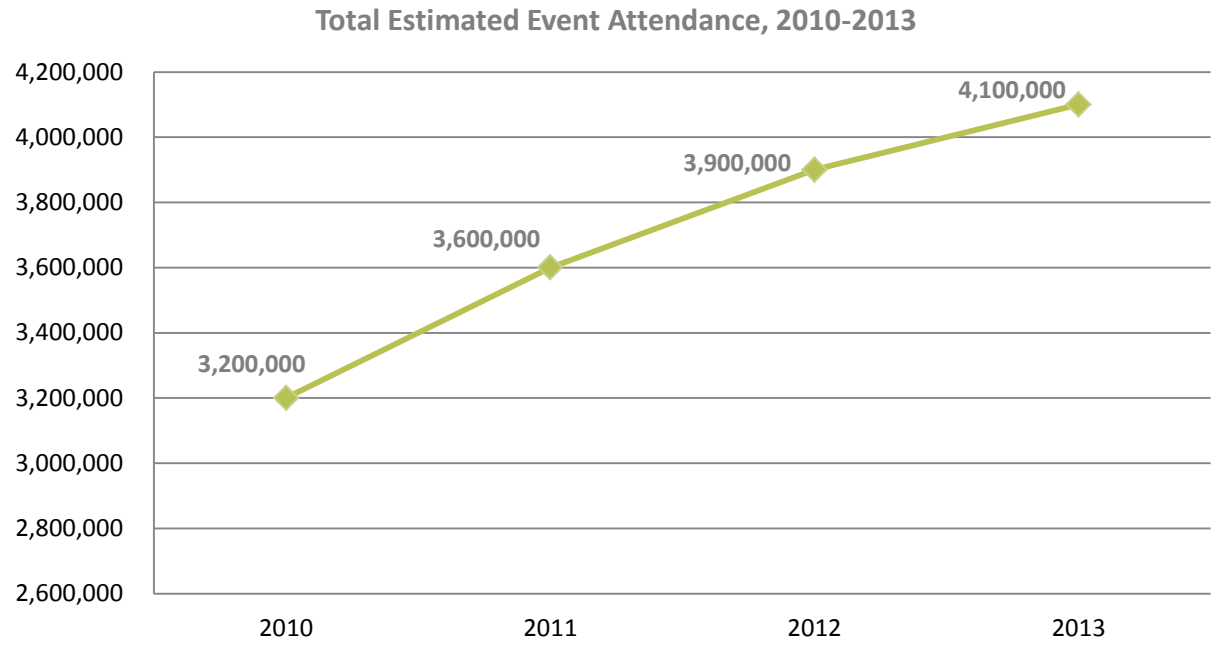
OVERALL ATTENDANCE ESTIMATE

The City has several larger festivals and events, most notably Mardi Gras, and in 2013, the Super Bowl, which occurred in the middle of the Mardi Gras season and is therefore listed here for this year. In the table below, attendance of 4 large events and 2 small to mid-size events are examined. The total attendance for these 6 events in 2013 was 2.3 million. The 2013 New Orleans Festival and Event Survey found an additional 637,903 attendees for surveyed festivals not included in the table below. For the remaining 100 events, we can roughly estimate the number of attendees if we use average sizes for small (500 attendees), neighborhood (1,500), mid-size (4,000), large (10,000-15,000), and Downtown/French Quarter events (20,000-25,000).

Major Event Attendance	2009	2010	2011	2012	2013
Mardi Gras	750,000	1,000,000	1,000,000+	1,000,000+	1,000,000
Super Bowl XLVII					133,145
French Quarter Festival	441,000	512,000	533,000	574,000	562,000
Essence Festival	428,000	405,000	419,000	413,400	540,000
Tales of the Cocktail	17,000	18,750	21,000	23,000	23,000
Bayou Boogaloo	20,000	23,000	27,000	25,000	35,000
Totals	**1,755,000**	**2,082,750**	**2,149,000**	**2,176,400**	**2,293,145**

Of course, this estimate is not only rough, but probably also undercounting some events and over-counting others. However, using this estimate, New Orleans' festivals enjoyed the patronage of 4.1 million people in 2013, a 28% increase since 2010.

Festivals are increasingly popular in recent years, and many, such as the French Quarter Festival, Tales of the Cocktail, and the Po-Boy Preservation Festival have grown impressively over the past 3-4 years. Finally, many people, especially locals, attend more than one festival, so there is overlap among this number. See the Local Economic Impact Section below for more information on attendee demographics.



MAJOR EVENT ECONOMIC IMPACT

Because of the frequency and popularity of festivals and events in New Orleans, some festival organizers conduct or commission their own economic impact surveys and studies each year. The information they gather helps them gather sponsorships and publicity, as well as track the health of their festival and input from attendees to improve future events.

Event	2009	2010	2011	2012	2013
Mardi Gras	$332,209,017	N/A	$300,700,000	$340,000,000	N/A
Super Bowl XLVII					$480,000,000
French Quarter Festival	$139,600,000	$316,000,000	$245,700,000	$259,500,000	$247,000,000
Essence Festival	N/A	$188,200,000	$170,400,000	$135,900,000	$231,600,000
Tales of the Cocktail	$9,700,000	$11,300,000	$12,700,000	$14,300,000	$14,100,000
Totals	**$487,109,017**	**$525,400,000**	**$740,400,000**	**$761,360,000**	**$972,200,000**

There has been a general increase in attendance of major events from 2009-2013. More people are attending major events, markets, and mid-size festivals every year. Tourists at events such as Essence and Tales of the Cocktail outnumber locals, increasing economic impact of these events through hotel stays, restaurant spending, and shopping.

As would be expected, the Super Bowl greatly increased the impact of local events in 2013. Almost $1 billion in economic impact was calculated for all 6 events. This is a 27% increase from 2012. If Mardi Gras data were available, the increase would be even larger. Even without Super Bowl impact, however, the total would likely be around $832 million if we hold the economic impact of Mardi Gras to be the same as 2012, which is still an increase of 9.1% from 2012.

The economic impact numbers above measure mainly the impacts of out-of-town visitors, spending money on lodging, meals, and entertainment. As we will see below, local attendees also have an economic impact, as do local festivals as purchasers of local goods and services.

LOCAL ECONOMIC IMPACT OF FESTIVALS AND EVENTS

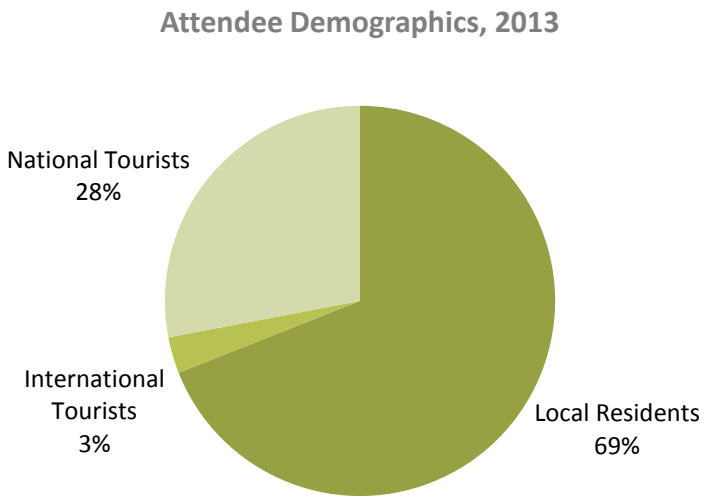
Cultural festivals and events provide several benefits that larger, more commercial, or more visitor oriented events do not. They can serve as an incubator for local performers and visual artists, allowing them to earn income, experience, and reputation. These can be used to gain access to professional venues such as clubs and galleries. Festivals' local economic impact is not only about overall monetary gain, but also about diversifying local economy. Festivals can provide a relatively reliable source of income for locals despite fluctuations in the greater marketplace. We can see this is so in the data above.

In order to measure the local economic impact of festivals, the Office of Cultural Economy conducted a 2013 Festival and Event Survey identical to the surveys in 2011 and 2012.[41] Our primary goals were to determine economic value of local festivals for cultural workers, particularly musicians, food vendors, and arts and crafts vendors; employment stemming directly from the festival and its economic benefits; volunteerism created by festivals, expenditure on local resources; and proportion of local expenditures spent on local entertainment and employees.

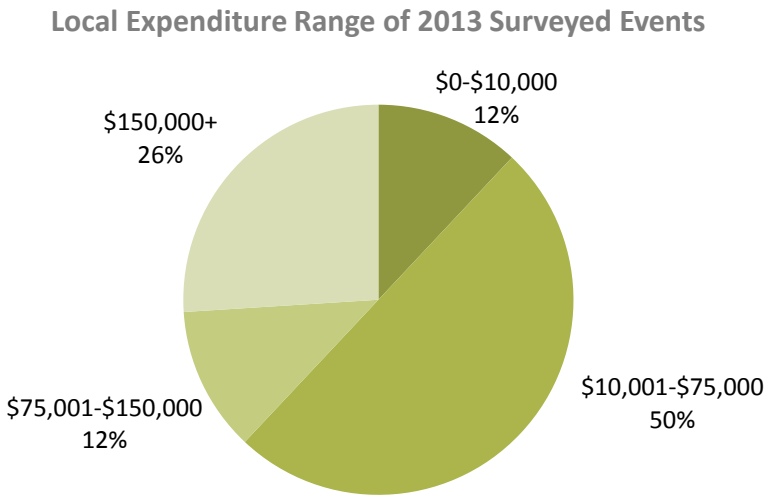
Of the events surveyed in 2013, 69% of attendees at surveyed festivals were locals. This is 5% lower than in 2012. The age of surveyed events ranged from 1 year to 36 years, with an average age of 13 years, very close to previous surveys. Half of surveyed events were under 10 years old and started after 2005. The local festival economy has rebounded impressively from Katrina and continued to grow since, despite economic turbulence and the oil spill in 2010 which depressed tourism in the Gulf Coast

[41] The 2013 Festival and Event Survey in this paper had a response rate of 28% or 37 festivals out of the total 130 contacted. The sample includes wide ranges of budget, type, and attendance. Statistical significance of the results was not calculated and at most, tentative correlations are noted, not causation or correlation coefficients.

region. In 2013, the total attendance for surveyed events was 665,287 people with an average of 22,176 people per event. Six of these events sold tickets, 30,373 in total and average ticket sales of 5,062 per event.



Local expenditure of surveyed festivals are those dollars that were spent in New Orleans and nearby communities, such as staging, permitting, rentals, site fees, entertainment, etc. Local expenditures of surveyed events ranged from $1,000 to $2,000,000 with an average of $197,688.



Almost all (99%) entertainment acts were local, from New Orleans itself or the Greater New Orleans area. On average, 23 entertainment acts were booked per festival. Festivals paid an average of $27,244 for their entertainment in total. Local entertainment represented between 50% and 100% of the overall local expenditures of 14% of surveyed events. For the majority of festivals (62%), local Entertainment expenditures ranged from 0% to 25% of their budget. Local events invest greatly in locally-based entertainment. Finally, festivals employ a variety of workers. Surveyed festivals employed either full- or

part-time workers, 394 people total in 2013, on average 13 workers. Each festival paid an average of $47,998 in payroll, $1,103,947 total for all events.
Food vendors were common at surveyed events. On average, events had 19 food vendors, although vendors ranged from 0 to as many as 120 for surveyed events. Almost 50% had 10 or more food vendors. Food vendors are often local restaurants, caterers, or mobile food vendors. Since this survey was to festival organizers, they were unable to provide an estimate of the wages made by vendor employees. However, they were able to estimate the number of food vendor employees at their events. On average, each event had 153 food vendor employees and 68% of festivals had 20 or more. Of the festivals surveyed 100% reported using exclusively local food vendors. Festival work most likely represents a significant portion of culinary economic activity for local vendors.

New Orleans is also known for its eclectic and active local art scene. Most events feature an artists' market or craft fair within the festival. Of the surveyed events, 44% had at least 10 art or craft vendors. On average, events featured 22 vendors. All surveyed events had exclusively local art and craft vendors. The table shows sales data from the City of New Orleans for all vendors who hold a Special Event vendor license and who reported sales during 2010-2013. However, because reporting for 2013 vendors is not complete as of the writing of this *Snapshot* it is likely to rise from the current $3.5 million.

Special Event Vendor Gross Sales

Year	Number of Vendors	Total Sales	Average Sales	Median Sales
2010	224	$3,007,719	$16,810	$3,253
2011	267	$4,045,511	$18,703	$3,221
2012	174	$4,436,043	$31,870	$5,017
2013	214	$3,492,026	$16,318	$4,059

Local festivals provide jobs and income for thousands in New Orleans. Local musicians and other performers benefit greatly monetarily from locally-oriented festivals and are featured heavily, giving them constant exposure to new audiences and enhancing their reputation with the public. Although it is beyond the means of this current survey, it is likely that festival work impacts the gigs available to musicians and other performers that participate in them. Finally, local festivals mean local expenditures. Festivals directly stimulate New Orleans' economy by buying and renting locally. Economic impact is not only from hotels and tourist dollars, but from these diverse, vibrant, and numerous smaller festivals, most of which are created by locals for locals. These grassroots festivals enhance the culture and image of our city, and bring our neighborhoods and population together. Of the 4.1 million that attended festivals this year, it is likely that 50% or more were locals, about 2 million people. The population of the Greater New Orleans area is only around 1 million as estimated by the 2010 Census, meaning most of the 2 million local attendees attend multiple local festivals. Festivals really are a way of life for local residents. Still, festivals, large and small, local and visitor oriented, are also attended by a significant amount of tourists, and represent a crucial part of both the tourism and cultural economies of New Orleans.

Festival	Type	Month
DANCE RENAISSANCE NEW YEARS FESTIVAL	Dance	January
TET LUNAR NEW YEAR	Holiday	January-February
MARDI GRAS	Holiday	February-March
STREET FOOD FESTIVAL AND VENDY AWARDS	Culinary Arts	March
FOODFEST: AMERICA'S HOMETOWN EATS	Culinary Arts	March
HOGS FOR THE CAUSE	Culinary Arts	March
NEW ORLEANS INTERNATIONAL BEER FESTIVAL	Culinary Arts	March
NEW ORLEANS OYSTER JUBILEE	Culinary Arts	March
FETE FRANCAISE	Cultural and Ethnic	March
SUPER SUNDAY	Cultural and Ethnic	March
PATOIS FILM FEST	Film and Video	March
EARTH FEST	Holiday	March
PARASOL'S ST. PATRICK'S DAY BLOCK PARTY	Holiday	March
TENNESSEE WILLIAMS NEW ORLEANS LITERARY FESTIVAL	Literary	March
BACH AROUND THE CLOCK	Music	March
BUKU FEST	Music	March
CONGO SQUARE RHYTHMS FESTIVAL	Music	March
FOBURG MUSIC FESTIVAL	Music	March
RIVERBEND CULTURAL ARTS FESTIVAL	Music	March
SACRED MUSIC FESTIVAL	Music	March
SOUL FEST	Music	March
OLD ALGIERS RIVERFEST	Neighborhood	March
NEW ORLEANS GIANT PUPPET FESTIVAL	Theatre	March
ART IN BLOOM	Visual Arts and Crafts	March
FASHION WEEK	Visual Arts and Crafts	March
NEW ORLEANS SPRING FIESTA	Holiday	March-April
FRENCH QUARTER WINE FESTIVAL	Culinary Arts	March-May
TASTE AT THE LAKE	Culinary Arts	April
CRAWFEST	Culinary Arts	April
SEAFOOD AND MUSIC FESTIVAL	Culinary Arts	April
UMOJA CELEBRATION OF THE AFRICAN CHILD	Cultural and Ethnic	April
FLEUR DE LINDY SWING HOP DANCE FESTIVAL	Dance	April
NEW DANCE FESTIVAL	Dance	April
LOUISIANA INTERNATIONAL FILM FESTIVAL	Film and Video	April
NEW ORLEANS EARTH DAY FESTIVAL	Holiday	April
FRENCH QUARTER FESTIVAL	Music	April
FRERET STREET FESTIVAL	Neighborhood	April
ST DOMINIC SPRING FAIR	Neighborhood	April
ST PIUS X SPRING FESTIVAL	Neighborhood	April
JAMMIN ON JULIA	Visual Arts and Crafts	April
NEW ORLEANS JAZZ AND HERITAGE FESTIVAL	Music	April-May
CRAWFISH MAMBO	Culinary Arts	May

Festival	Type	Month
NEW ORLEANS WINE AND FOOD EXPERIENCE	Culinary Arts	May
ASIAN HERITAGE FESTIVAL	Cultural and Ethnic	May
GREEK FESTIVAL	Cultural and Ethnic	May
INDIA FEST	Cultural and Ethnic	May
FILM-O-RAMA	Film and Video	May
SAINTS AND SINNERS LITERARY FESTIVAL	Literary	May
BAYOU BOOGALOO	Music	May
BIRDFOOT CHAMBER MUSIC FESTIVAL	Music	May
CHAZ FEST	Music	May
NEW ORLEANS STRING PROJECT CRAWFISH BROIL	Music	May
NOIZEFEST	Music	May
BEAUJOLAIS FESTIVAL	Culinary Arts	June
CREOLE TOMATO FESTIVAL	Culinary Arts	June
FRIED FOOD FEST	Culinary Arts	June
FRENCH SUMMER WINE FESTIVAL	Culinary Arts	June
NEW ORLEANS OYSTER FESTIVAL	Culinary Arts	June
LOUISIANA CAJUN ZYDECO FESTIVAL	Music	June
FORESTIVAL	Visual Arts and Crafts	June
TALES OF THE COCKTAIL	Culinary Arts	July
MAAFA COMMEMORATION	Cultural and Ethnic	July
NEW ORLEANS FRENCH FILM FESTIVAL	Film and Video	July
GO FOURTH ON THE RIVER	Holiday	July
SAN FERMIN IN NUEVA ORLEANS/RUNNING OF THE BULLS	Holiday	July
ESSENCE MUSIC FESTIVAL	Music	July
GREAT AMERICAN SEAFOOD COOKOFF	Culinary Arts	August
SATCHMO FEST	Music	August
SATCHMO STRUT	Music	August
SIX STRING MUSIC FESTIVAL	Music	August
DIRTY LINEN NIGHT	Visual Arts and Crafts	August
WHITE LINEN NIGHT	Visual Arts and Crafts	August
FALL GARDEN FESTIVAL	Culinary Arts	September
SOUTHERN DECADENCE	Cultural and Ethnic	September
NEW ORLEANS BURLESQUE FESTIVAL	Dance	September
FF ONE	Film and Video	September
NEW ORLEANS CHILDREN'S FILM FESTIVAL	Film and Video	September
MIGHTY MISSISSIPPI DOWNRIVER FESTIVAL	Literary	September
WRITE NOLA POETRY FESTIVAL	Literary	September
CARNAVAL LATINO	Music	September
NOLA DOWNTOWN MUSIC AND ARTS FESTIVAL	Music	September
PONDEROSA STOMP	Music	September
ST. AUGUSTINE EDWIN HAMPTON MUSIC FESTIVAL	Music	September
LOUISIANA SEAFOOD FESTIVAL	Culinary Arts	October

Festival	Type	Month
CELEBRACION LATINA	Cultural and Ethnic	October
JAPAN FEST	Cultural and Ethnic	October
NICKEL-A-DANCE	Dance	October
AFRIKAN FILM AND ARTS FESTIVAL	Film and Video	October
NEW ORLEANS FILM FESTIVAL	Film and Video	October
BOO CARRE HALLOWEEN AND HARVEST FESTIVAL	Holiday	October
NEW ORLEANS CHILDREN'S BOOK FESTIVAL	Literary	October
CRESCENT CITY BLUES AND BBQ FESTIVAL	Music	October
PRAISE FEST	Music	October
VOODOO EXPERIENCE	Music	October
BROADMOOR FEST	Neighborhood	October
GENTILLY FEST	Neighborhood	October
ART FOR ART'S SAKE	Visual Arts and Crafts	October
PROSPECT	Visual Arts and Crafts	October
NEW ORLEANS PO-BOY PRESERVATION FESTIVAL	Culinary Arts	November
TREME CREOLE GUMBO FESTIVAL	Culinary Arts	November
BAYOU BACCHANAL	Cultural and Ethnic	November
FESTIVAL OF INDIA	Cultural and Ethnic	November
FOLK MAGIC FESTIVAL	Cultural and Ethnic	November
INTERNATIONAL DAY CELEBRATION	Cultural and Ethnic	November
LOUISIANA SWAMP FESTIVAL	Cultural and Ethnic	November
SCANDINAVIAN FESTIVAL	Cultural and Ethnic	November
WORDS AND MUSIC	Literary	November
FIESTA LATINA	Music	November
LADYFEST	Music	November
MAGAZINE STREET BLUES FESTIVAL	Music	November
MAKE A JOYFUL NOISE GOSPEL FESTIVAL	Music	November
MIRLITON FESTIVAL	Neighborhood	November
HELL YES FEST	Theatre	November
NEW ORLEANS FRINGE THEATER FESTIVAL	Theatre	November
NORTH RAMPART FESTIVAL	Visual Arts and Crafts	November
TALES OF THE TODDY	Culinary Arts	December
ALGIERS CHRISTMAS BONFIRE	Holiday	December
CHRISTMAS NEW ORLEANS STYLE	Holiday	December
HOLIDAY ON THE BOULEVARD	Holiday	December
JAZZ AND HERITAGE HOLIDAY BAZAAR	Holiday	December
NEW ORLEANS SONGWRITERS FESTIVAL	Music	December
JAZZ IN THE PARK	Music	Fall to Spring
THURSDAYS AT TWILIGHT	Music	Fall to Spring
WEDNESDAYS AT THE SQUARE	Music	Fall to Spring
ARMSTRONG PARK MARKET	Culinary Arts	Year-round
CRESCENT CITY FARMERS MARKET (3 LOCATIONS)	Culinary Arts	Year-round

Festival	Type	Month
HOLLYGROVE MARKET AND FARM (2 LOCATIONS)	Culinary Arts	Year-round
OLD ALGIERS HARVEST FRESH MARKET	Culinary Arts	Year-round
SANKOFA MARKETPLACE	Culinary Arts	Year-round
FRERET STREET MARKET	Neighborhood	Year-round
FRENCHMEN ART MARKET	Visual Arts and Crafts	Year-round
HARRISON AVENUE MARKETPLACE	Visual Arts and Crafts	Year-round
OCHALEY ART MARKET	Visual Arts and Crafts	Year-round
PALMER PARK ARTS MARKET	Visual Arts and Crafts	Year-round
PIETY STREET MARKET	Visual Arts and Crafts	Year-round

SEGMENTS OF THE CULTURAL ECONOMY: DESIGN

INTERACTIVE MEDIA

OVERVIEW OF LOUISIANA INTERACTIVE MEDIA INCENTIVES

Louisiana sees the potential in the digital interactive industry. Its Digital Interactive Media Incentive targets gaming, simulation training, web applications and the next generation of distributed Entertainment. The Interactive Media Incentive initiative hopes to build this industry and support a highly skilled, creative and technology-driven workforce.

Louisiana offers a 25% tax credit for in-state production expenditures and a 10% tax credit for Louisiana resident payroll expenditures for gaming, web applications, and the next generation of interactive content. There are no minimum investment requirements and no cap on production expenditures. Credits may be applied to Louisiana tax liability, sold back to the state, or sold on the secondary market.[42]

INTERACTIVE MEDIA IN NEW ORLEANS

As outlined in the Employment and Businesses chapters, there are 22 graphic and web design businesses in New Orleans in 2013. Also, 505 Graphic and Web Designers worked outside of cultural businesses in 2013. Finally, 38% of Design jobs are self-employed, meaning that many graphic designers and others in digital design work from home, as contractors, or in another independent fashion.

While New Orleans has about 10% less Design jobs when compared to the United States as a whole, New Orleans also has several post-production special effects and digital effects studios that may develop interactive media. Human resources and business management companies also at times devleop their own software to manage payroll, finances or other incentive-qualifying projects. Health sciences businesses may commission or have small limited liability companies that develop software to help doctors and patients interact, electronic charting and more.

As can been seen in the accompanying graphs, New Orleans continues to net less than 50% of interactive media projects that qualify and apply for the Louisiana Interactive Media Tax Credits.[43] Although not calculated, the majority of firms applying for incentives were located in the Shreveport and Baton Rouge areas.[44] Consequently, New Orleans' share of local expenditures and payroll when compared to the rest of Louisiana never rises above 20%. However, if we compare the proportion of local expenditure and payroll to the proportion of projects the City nets, some improvement is evident.

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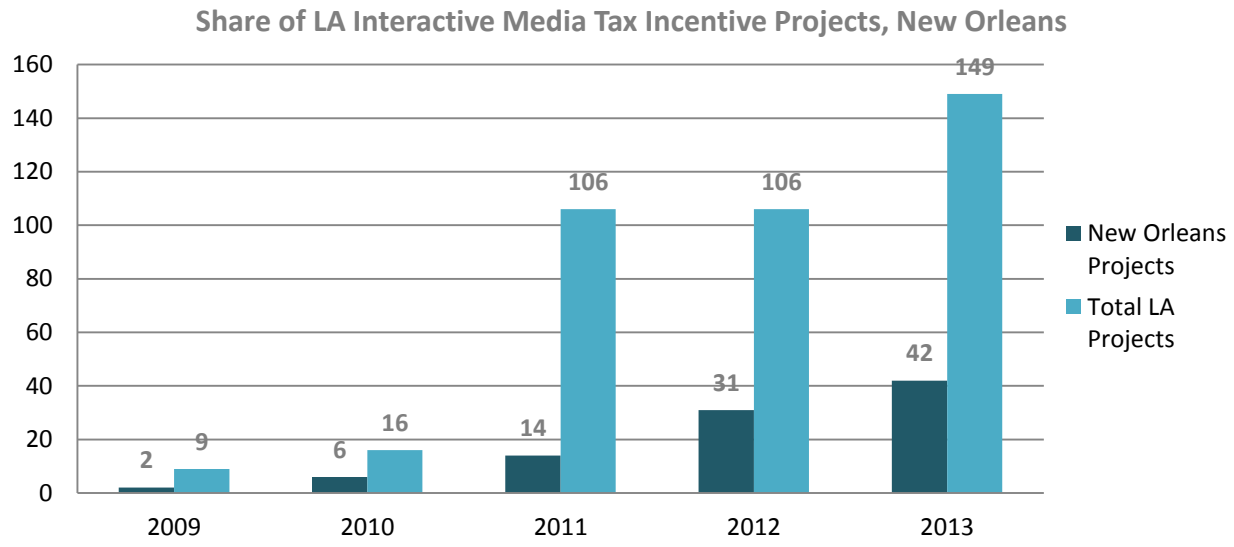
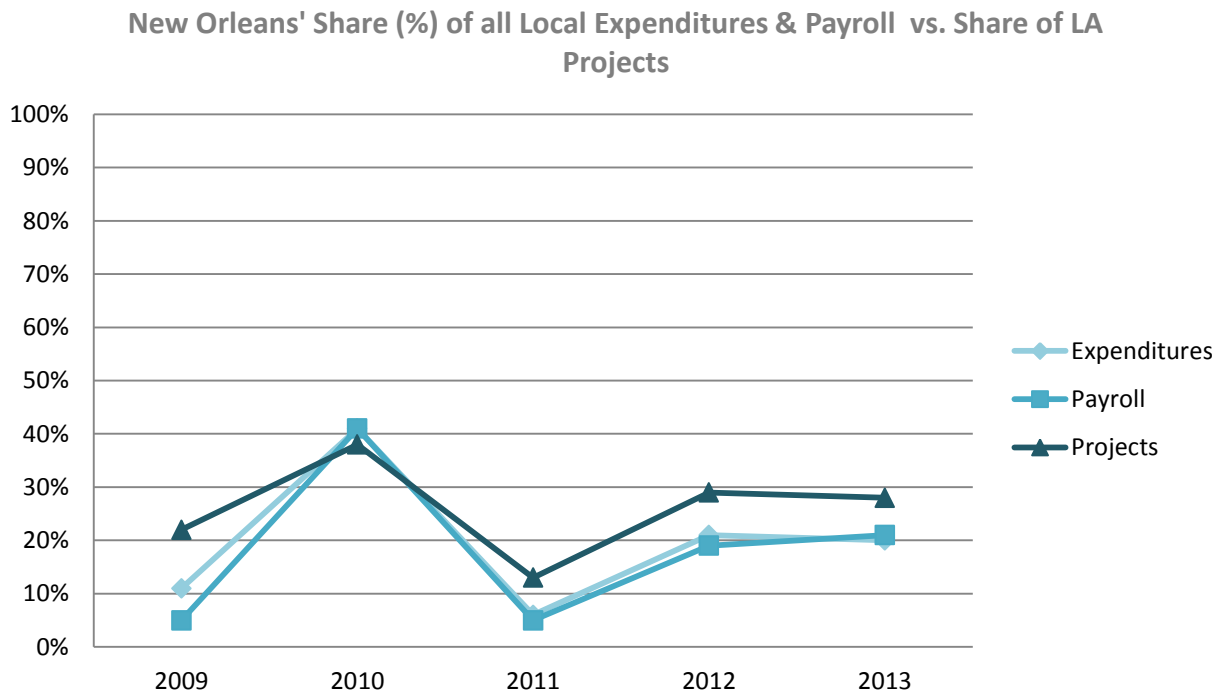
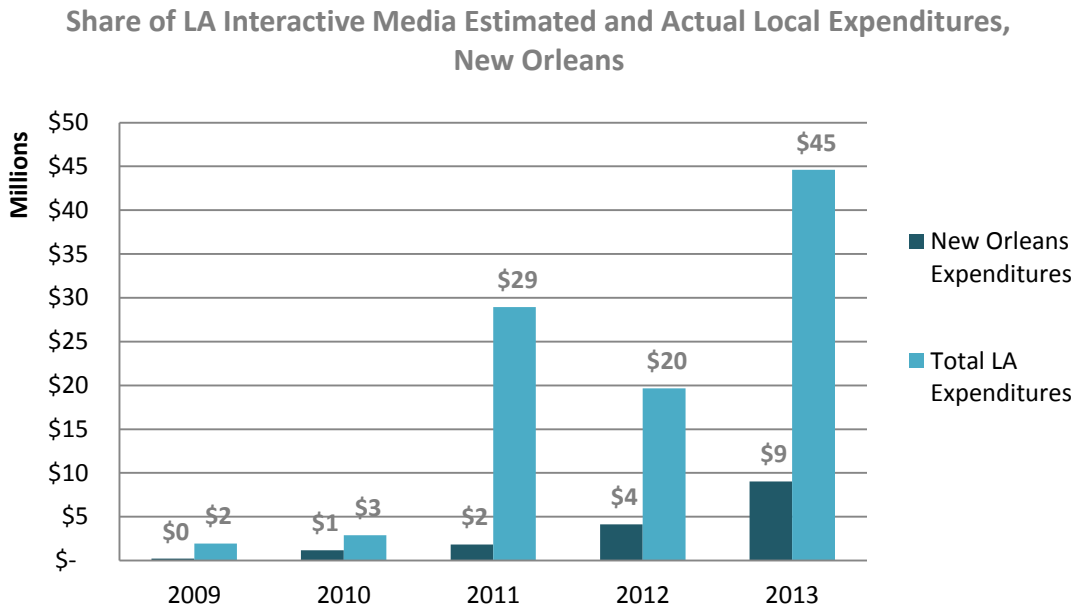
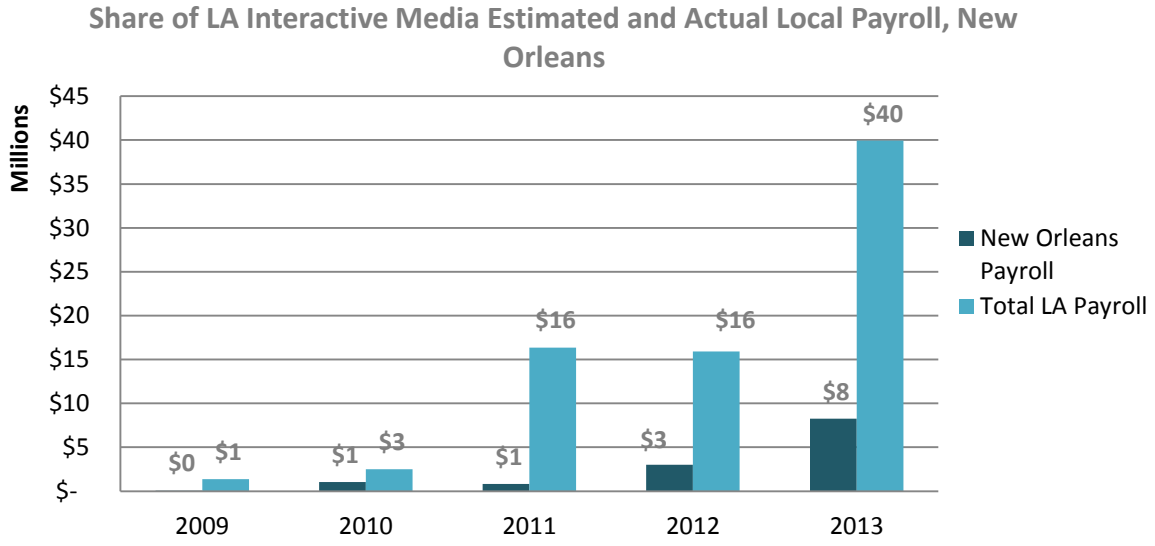
[42] From the Louisiana Office of Entertainment Industry Development website: http://louisianaentertainment.gov/index
[43] For this survey, only projects that were certified and to which the state had paid tax credits were counted. 2009-2012 data was adjusted to reflect any changes, updates in the data and other adjustments made by the State of Louisiana.
[44] Location of Interactive Media Tax Incentive projects were determined by the address listed on the application for each project.





Generally, the local expenditure and payroll of projects is not proportional to the number of projects the city hosts. For example, in 2009, the city netted 22% of all interactive media projects in the state, but only 11% of all local expenditures by these projects in the state. Basically, interactive media projects in New Orleans are spending and paying employees less locally than projects in other parts of the state. However, in 2010, expenditure and payroll managed to slightly exceed the proportion of projects and since then the gap between the number of projects and their investment in the local economy and workforce has been closing.


Share of LA Interactive Media Estimated and Actual Local Expenditures, New Orleans
Millions
$50
$45
$40
$35
$30
$25
$20
$15
$10
$5
$-
$0
$2
$1
$3
$2
$29
$4
$20
$9
$45
2009
2010
2011
2012
2013
New Orleans Expenditures
Total LA Expenditures


Share of LA Interactive Media Estimated and Actual Local Payroll, New Orleans
Millions
$45
$40
$35
$30
$25
$20
$15
$10
$5
$-
$0
$1
$1
$3
$1
$16
$3
$16
$8
$40
2009
2010
2011
2012
2013
New Orleans Payroll
Total LA Payroll

SEGMENT FEATURE: VISUAL ARTS AND CRAFTS

VISUAL ARTS AND CRAFTS ARTISTS ECONOMIC SURVEY

For the first time in 2014, in partnership with the Arts Council of New Orleans, the Office of Cultural Economy surveyed over 100 artists to learn more about how their visual art and craft work impacts their lives and income. Overall, 113 artists responded to the online survey distributed by the Arts Council via email over the 30 day period. Of these, 48% were over 50 years of age, 50% were between the ages of 21 and 49 and 2% below 21 years of age. The vast majority of the respondents were female (76%), 76% had at a post-high school degree, and 51% had a household income of over $50,000 per year.

Because the survey was distributed via email to artists registered with official arts organizations, the skewing of the respondents towards wealthier, more educated households is to be expected. In future surveys, distributing through social media and less formally organized collectives in newer art districts will likely yield a more diverse set of respondents. However, the survey still has provided a large amount of useful information not usually collected in the visual arts and crafts sphere.

ECONOMIC PROFILE OF ARTIST SURVEY RESPONDENTS

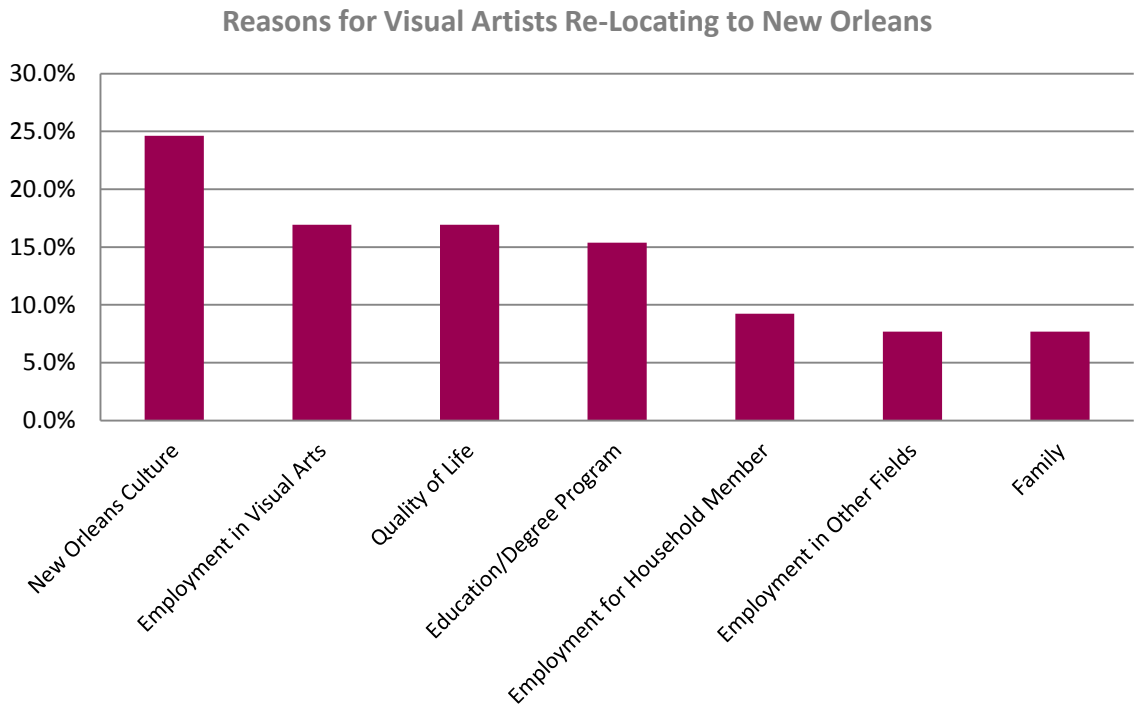
- 22% earn 100% of their income from their own visual arts and crafts work
- 65% own their own their own business
    - Of those 65%, 92% are businesses focused on the making and/or sale of visual arts and crafts
- Of those that have other employment (50%):
    - 29% work in Education, Training, and Library Occupations
    - 25% work in Arts, Design, Entertainment, Sports, and Media Occupations
    - 6% were employed in Management Occupations; 6% in Legal Occupations, 6% in Food Preparation and Serving; and 6% in Sales
- 44% devote 30 or more hours a week to their art while only 18% spend 10 hours a week or less
- 54% were not from New Orleans, but had re-located to New Orleans
- Only 31% work in a studio outside of their homes
- 54% describe their art income as “Essential,” meaning their quality of life would decrease significantly without it

WHY NEW ORLEANS?

As shown in the Employment and Business Chapters, while Visual Artists only make up 6% of jobs in the New Orleans cultural economy, there are about 50% more visual art jobs here in the city compared to the United States on average. Of those jobs, 75% are self-employed visual artists, gallery owners, or others. There are 143 art galleries in the city, and visual art businesses make up 10% of the cultural businesses in the city.

So while visual art may not be the first thing a visitor might think of when contemplating New Orleans, it is an important part of our economy, and more importantly, it permeates the other parts of our cultural economy as well. Artists in New Orleans display their work in public places, most notably Jackson Square, participate in almost every festival, hold weekly and monthly art markets, and their paintings, drawings, sculptures, masks, and prints are sold everywhere a visitor may want to shop.

Of the 113 surveyed artists, 54% were not originally from New Orleans, but re-located here or come here for frequent work. In order to better understand the appeal of New Orleans to visual artists and crafters, we asked them for their primary reason for coming here.

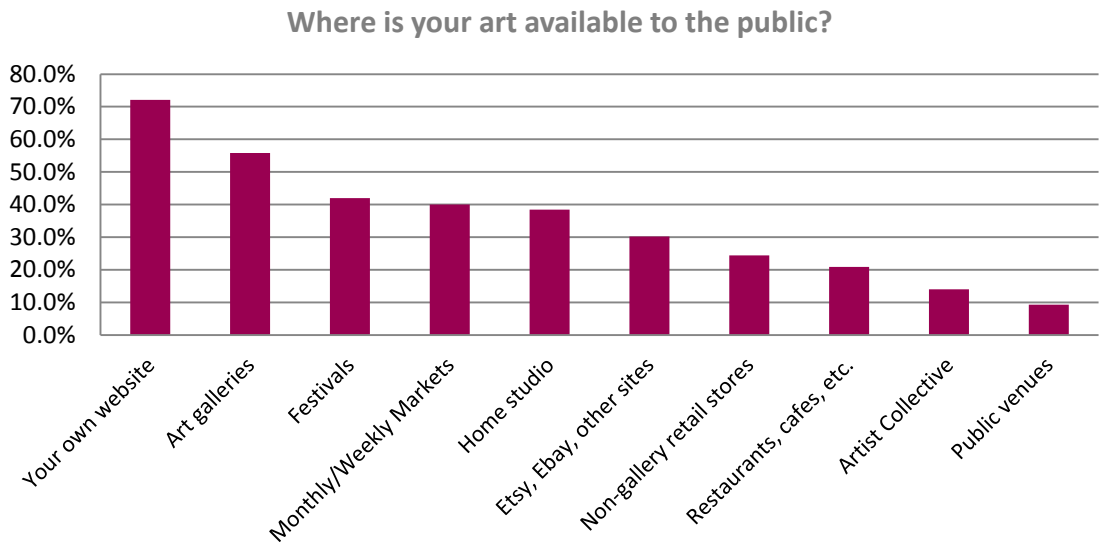


Almost 25% moved here for the unique culture of New Orleans, and 17% for the quality of life. This may be surprising to those outside of New Orleans who may focus on many of the issues that the city faces such as blight, poverty, and crime, but our culture, including all the arts, festivals, and traditional culture bearers, is a main attractant for many and drastically improves the quality of life for our residents. These two responses were closely related, with many of those who selected “Quality of Life” also mentioning the city’s culture in the comment box for this question.

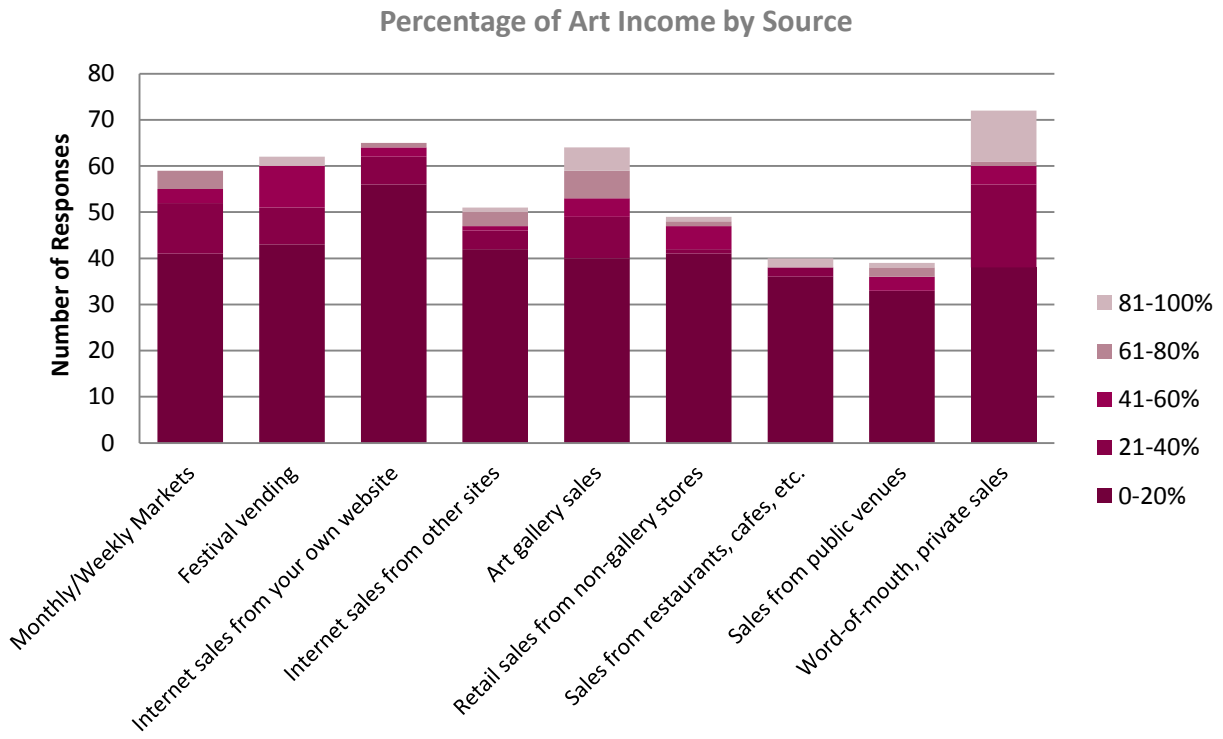
However, from an economic perspective, the 17% who came to the city for employment in visual arts is very promising. Being able to make a living or substantially impact your income with your own visual art

work is both difficult and rare. New Orleans is apparently a city that makes that a bit easier. One of the ways that may facilitate this is the large number of venues available to display and sell artwork. Outside of the 143 art galleries, art is sold in a large variety of places as seen in the figure below. About 56% of artists have their work available in art galleries, but additionally, 42% of surveyed artists sell their work at over 110 festivals annually in the city, and 40% at weekly and monthly art markets.

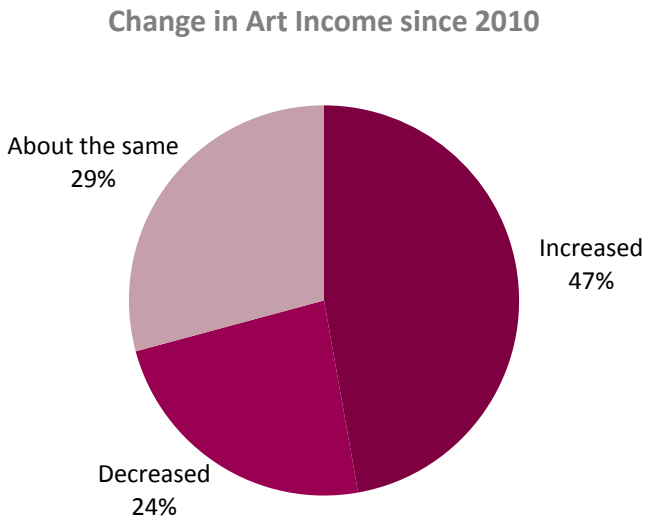
New Orleans also provides public spaces such as Jackson Square, Dutch Alley in the French Market, and Pirates' Alley to artists to sell their art outdoors, and there are many home studios open to the public throughout the city. Even non-retail stores, such as restaurants and coffee shops display and sell art right off their walls. Finally, the internet was a popular option with over 70% selling from their own websites and 30% selling from 3rd party sites.



This diversity of possible sales venues for visual art is vital to the opportunity for these artists to make their living from their craft. Surveyed artists indicated that their art-related income comes from almost all of the places and sources mentioned above. The vast majority of respondents indicated that they received 0-20% of their art income across the nine possible sources, indicating that most respondents engaged in three or more of these venues to sell their art and earn their art-related income. Outside of this majority, word-of-mouth/private sales, gallery sales, and festival and market vending tended to provide the lion's share of art income for those artists that did not participate in a diverse array of selling venues.



Finally, another reason that visual artists come and stay in New Orleans may be that their art-related income has been rising since 2010. Almost 50% indicated that this income had increased in the last four years, and 30% indicated that it had remained the same. In an economy that has been recently noted for its stagnating wages, the increase in art income is a promising enticement that may attract visual artists to the city.



SEGMENT FEATURE: VISUAL ARTS AND CRAFTS

CULTURAL PRODUCTS DISTRICTS

In 2007, the Department of Culture, Recreation and Tourism under the Office of the Lt. Governor researched and passed into law the Louisiana Cultural Districts Program (CDP). The Program's primary initiative is to "revitalize communities by creating locally driven hubs of cultural activity." The Mayor's Office of Cultural Economy recognizes that encouraging cultural activity in targeted neighborhoods in Orleans Parish is a valuable tool for economic development and neighborhood revitalization and in line with Mayor Landrieu's focus on place-based development for sustainable neighborhoods.

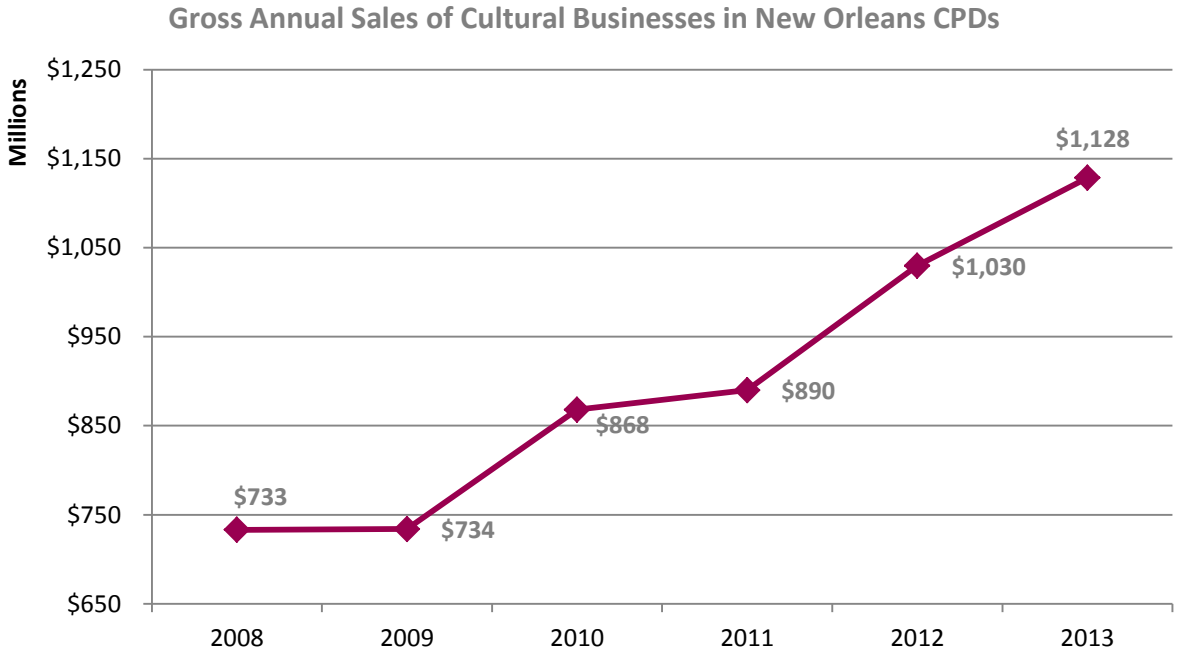
The Cultural Products Districts Program uses a two-pronged approach to encourage investment in designated neighborhoods through cultural preservation and development: a CPD designation allows owners of both residential and commercial buildings over 50 years old from the present date to apply for state historic tax credits and it also allows businesses and individuals to sell original works of art without charging local and state sales tax. Specifically, the CPD Program is guided by the following policy aims, the Cultural Economic Criteria according to the CPD Guidelines: promote the arts and support artists; encourage creativity and cultural activity; attract artists and cultural industry workers; engage residents; strengthen of community partnerships; capitalize on cultural, economic and social assets; stimulate the economy; and draw tourists.

CULTURAL PRODUCTS DISTRICTS GROSS SALES, 2008-2013

The Louisiana Department of Culture, Recreation, and Tourism defines cultural businesses for the CPD program as:

- Galleries
- Restaurants and Specialty Food Stores
- Salons
- Gift Shops
- Antique Stores
- Museums
- Photography Studios

This is a far narrower definition than the cultural economy definition used by the City of New Orleans, but its purpose is to measure the returns of those cultural businesses most attuned to original art sales and tourism, not to the entire cultural economy as in the rest of this research. For these cultural businesses, the 22 CPDs had gross sales of $1 billion in 2012 and $1.1 billion in 2013, a 10% increase.



Increasing sales revenue numbers above are due to actual growth within particular districts through increased number of businesses or increased sales from existing businesses, expanded districts in late 2012 (Oretha Castle Haley, Gentilly, and Irish Channel), and a new district, Faubourg St. John. The expansion of Oretha Castle Haley and the opening of several restaurants in the original district caused an extreme increase of 900% (9 times increase) in sales revenue in 2013 over 2012. The expansion of the Irish Channel also resulted in more than doubling sales revenues. The real gainers were the Lafitte, Lower Ninth, and Lincoln Beach districts. Without any expansions, new and existing businesses increased revenue by almost double over 2012 in Lower Ninth, 70% in Lafitte, and 42% in Lincoln Beach.

Gross Sales Cultural Businesses

Cultural Products District	2010	2011	2012	2013	% Change from 2012-2013
Bayou Road	$8,994,433	$7,856,423	$8,231,829	$5,177,125	-37%
Downtown Development	$309,174,445	$331,901,948	$333,253,734	$302,387,705	-9%
Faubourg St. John	N/A	N/A	N/A	$16,028,395	N/A
Federal City and Tunisburg	$86,673	$38,804	$49,371	$4,180	-92%
French Quarter	$371,978,532	$361,690,746	$396,725,948	$447,872,389	13%
Freret	$1,163,883	$1,366,421	$6,722,273	$8,800,231	31%
Gentilly	$2,918,349	$2,748,893	$3,311,720	$2,922,643	-12%
Irish Channel	$17,502,990	$18,562,309	$17,039,132	$39,847,936	134%
Lafitte Greenway New City	$851,479	$985,975	$1,067,996	$1,815,346	70%
Lincoln Beach	$922,264	$1,123,868	$974,297	$1,384,574	42%
Lower Garden District	$42,479,607	$40,597,321	$40,922,604	$52,275,896	28%
Lower Ninth Ward	$132,509	$143,432	$203,253	$375,950	85%
Magazine Street Gallery	$35,523,408	$36,346,167	$37,324,105	$47,685,633	28%
Museum City Park	$21,662,953	$25,550,636	$26,875,143	$28,123,515	5%
Oak Street	$17,449,663	$18,787,465	$21,908,391	$21,034,578	-4%
Old Algiers	$695,534	$1,083,999	$1,245,866	$1,468,703	18%
Oretha Castle Haley	$324,419	$927,365	$198,964	$2,021,200	916%
Rampart Basin Street	$4,119,013	$4,610,518	$44,160,296	$45,055,128	2%
South Broad	$10,110,136	$11,065,245	$11,556,714	$3,792,869	-67%
St. Claude Corridor	$17,998,233	$20,026,565	$23,285,228	$27,588,911	18%
Uptown-University	N/A	N/A	$62,110,030	$69,874,846	13%
Viet Village	$4,068,395	$4,438,474	$3,748,977	$2,875,854	-23%
Totals	**$868,159,918**	**$889,852,574**	**$1,040,915,871**	**$1,128,413,607**	**8%**

ORIGINAL ART SALES TAX EXEMPTION DATA, 2009-2013

The exemption of local and state sales taxes for original art is an important part of the Cultural Products District Program. Particularly when buying significant collector pieces priced at thousands of dollars, the sales tax exemption can make the difference for a sale in galleries around the city. However, the exemption also attracts original art vendors to festivals held within Cultural Products Districts and entices consumers at these venues no matter how serious a collector they may be.

Significant marketing to art selling businesses was conducted in 2010; however in 2009, the first year this data is available, many art sellers did not have direct access to the necessary forms and instructions to take advantage of the exemption. The extensive marketing in 2010 increased the monetary value of sales claimed in 2010 from $4.6 million to $7.1 million, a 54% increase. In 2011, the total value of sales claimed exempt reached $8.4 million, a 15% increase from 2010 and a 45% increase from 2009.
In 2012, claims increased to $11.2 million, an increase of 33% over 2011 and 57% over 2010. In 2013, sales declined 3% from 2012, but are still 52% higher than 2010.

Total Value of Sales Tax Claimed Exempt, 2009-2013

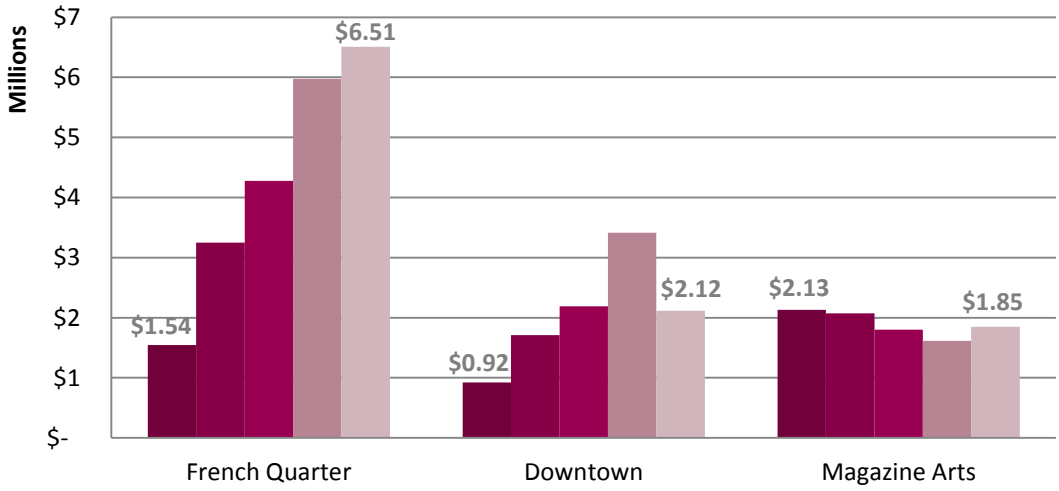
District	2009	2010	2011	2012	2013
French Quarter	$1,543,869	$3,250,474	$4,275,622	$5,974,038	$6,508,780
Downtown	$923,282	$1,712,885	$2,192,339	$3,413,876	$2,117,316
Magazine Arts	$2,133,066	$2,070,842	$1,802,490	$1,613,897	$1,850,903
Lower Garden	$8,702	$74,982	$101,858	$1,464	$295,667
Irish Channel		$0	$0	$14,771	$27,340
Faubourg St. John					$15,219
Old Algiers	$0	$0	$0	$850	$8,366
Uptown-University				$22,235	$3,730
St Claude	$0	$0	$1,665	$12,420	$3,730
Oak Street	$0	$26,656	$25,034	$118,827	$2,350
Museum City Park	$2,178	$0	$0	$0	$1,447
Total for Orleans	**$4,611,097**	**$7,135,839**	**$8,399,008**	**$11,172,378**	**$10,834,848**

The CPD program has also finally begun to reap the benefits of outreach to art businesses. Of the 254 estimated art selling businesses in 21 districts, 30% claimed the sales tax exemption at least once in 2013. Large increases in the number of art sellers due to expanding and new districts led to a lower percentage of businesses using the tax credit, but out of a significantly larger pool. Overall, 20 more businesses used the tax exemption in 2012 than in 2013. Also, about 20 new art selling businesses were added to the districts during that same time frame, which may mean that simply more outreach to new art selling businesses is required.

2009-2013 Estimates for Number of Original Art Selling Businesses

District	2009	2010	2011	2012	2013
Bayou Road	4	4	5	2	5
Downtown	27	35	31	25	35
Federal City	2	1	0	0	0
French Quarter	87	84	78	93	101
Freret	0	3	3	0	2
Gentilly	0	1	1	0	0
Irish Channel		4	7	6	5
Lafitte Greenway	0	0	0	0	0
Lincoln Beach	0	0	0	0	0
Lower Garden District	16	20	17	15	20
Lower Ninth Ward	0	0	0	0	0
Magazine	21	41	36	31	31
Museum City Park	4	4	2	1	4
Oak Street	3	3	8	15	8
Old Algiers	0	2	2	2	5
Oretha Castle Haley	1	4	2	1	1
Rampart Basin	6	5	3	1	4
St. Claude	13	36	31	34	16
South Broad Street	0	0	1	0	0
Uptown University				11	17
Viet Village	0	0	0	0	0
Total Orleans	**184**	**247**	**227**	**237**	**254**
% of Businesses Claiming Exemptions	**21%**	**17%**	**21%**	**38%**	**30%**

Total Value of Original Art Sales for Sales Tax Exemption, 2009-2013



MUSEUMS

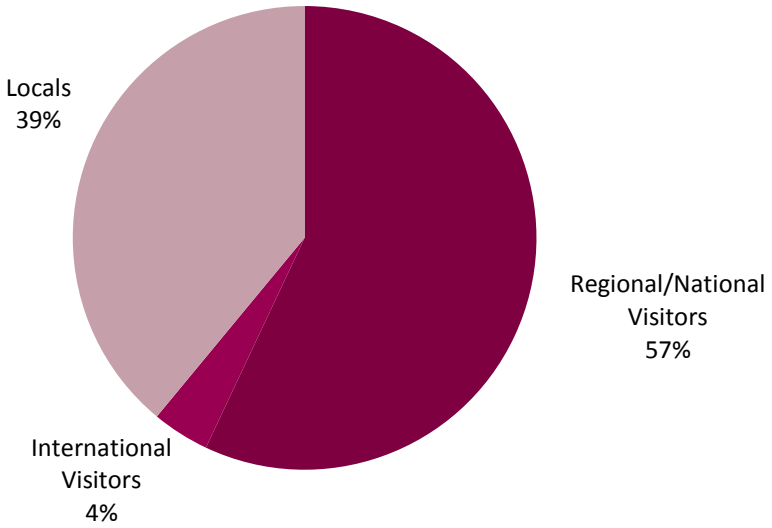
Museums are an important feature of all 22 CPDs and of the city's cultural economy in general. New Orleans boasts several major museums, the most prominent being the National World War II Museum, which has the highest ticket sales of all the major museums surveyed and is a major tourist draw. The century old New Orleans Museum of Art, the Ogden Museum of Southern Art, the Southern Food and Beverage Museum, the Louisiana Children's Museum, the Cabildo, and the Old US Mint are also important regional draws, featuring local and Southern arts, culture and history. The City also has a handful of smaller, locally run and sourced museums dedicated to New Orleans' unique history. The Backstreet Cultural Museum and the House of Dance of Feathers feature New Orleans' traditional cultural activities, especially second lines and Mardi Gras Indian rituals and parades. The African American Museum in the Tremé features the unique local history of free and enslaved people of color throughout New Orleans history.

In 2013, the city's largest museums hosted 760,000 visitors, sold $9.5 million in tickets and paid over $15 in local payroll to 450 employees. Overall, the number of employees at major museums rose by 6%, attendance by 3%, ticket sales by 27%, and payroll by 18%. Museums are also attracting tourists and regional visitors more each year, up 4% in 2013 from 2012.

Museums in New Orleans, 2012-2013

Year	Employees	Attendance	Ticket Sales	Payroll
2012	423	741,445	$ 7,513,314	$12,746,032
2013	447	764,121	$ 9,512,714	$15,053,956

Museum Attendance Breakdown, 2013



METHODOLOGY

DEFINITION

The definition of the "cultural economy" used for this report is based on the one used in the 2011 and 2012 updates, which were themselves adaptations of the definition used in the 2005 Mt. Auburn Associates' report, *Louisiana: Where Culture Means Business*. Mt. Auburn developed six broad segments to describe the cultural economy in New Orleans: Culinary Arts, Entertainment, Preservation and Heritage, Literary Arts, Design, and Visual Arts. This update has added, removed, and shifted several occupations and industries with the goal of more precisely targeting the cultural economy.

EMPLOYMENT DATA SOURCES

The employment statistics and figures in this update are based on data from EMSI's 4th Quarter 2013 release. EMSI's data set includes regular employment (wage and salary workers) as well as the self-employed. Self-employed workers include the self-employed proprietors counted in official census data as well as extended proprietorships—"workers who are counted as proprietors, but classify the income as peripheral to their primary employment." In the cultural economy, extended proprietorships are generally people with "day jobs" who also do freelance work in a creative field. Unless otherwise noted, the statistics in this report include both self-employed workers and regular employees.

It is important to note that all of the job figures in this report represent direct employment within a given cultural industry or occupation—there are no spending multipliers or other measures of indirect impact being included. Also, this report considers both creative industries and creative occupations. Most economic studies of the creative sector look only at industry employment, so they miss out on all the cultural workers who work in other sectors. Because there is an overlap (creative workers in creative industries), industries and occupations cannot simply be added together, so they are analyzed in two separate sections. However, the last part of the update includes an estimate of this overlap and the total number of jobs associated with the cultural economy using EMSI's occupation staffing patterns data.

In the following cases, adjustments were made to the raw EMSI data in order to reach better estimates of cultural employment in cases where a category is too general:

- including just 30 % of the jobs in the construction-related industry and occupation codes that are part of the Preservation and Heritage in order to exclude work unrelated to historic Preservation (a conservative estimate according to past interviews);
- counting only 80 % of the employment in "cafeterias, buffets, and grill buffets" and "full-service restaurants" in order to eliminate jobs at non-local chain restaurants from the culinary segment (an estimate based on past survey information);
- including just 70 % of drinking establishment employment as part of the Entertainment segment (based on past inventories of establishments that hosted regular music or Entertainment);
- adding employment in the librarian, library technician, and library assistant occupations to the job count for cultural industries since nearly all library employment is counted as part of very broad government and education NAICS codes; and

- breaking out the large, catchall "independent artists, writers, and performers" industry into the segments using EMSI's staffing patterns data, which provides estimates of the distribution of occupations within an industry. Jobs in occupations tied to a cultural segment were added to the corresponding industry segment, and then the remainder (jobs in miscellaneous occupations and occupations where data were suppressed) was divided between the Design, Visual Arts, Entertainment, and Literary Arts segments according to their size.

The individual industry and occupational estimates for the period 2002 to 2012 may vary from previous updates as EMSI revises old data based on newly released information and changes in its algorithms—for industries the changes are usually minor, but for occupations they can be large. Because of this, but also because of the changes Mt. Auburn has made in its methods and segment definitions, the statistics in this update should not be directly compared to those in previous updates.

The data on nonprofits come from the official statistics that the IRS makes available on tax-exempt organizations. This year, Mt. Auburn Associates used the official IRS Exempt Organization spreadsheets to construct a list of nonprofits rather than a proprietary source because it was found to be more accurate, more complete, and easier to use, at least for this purpose. To construct the list, Mt. Auburn began with the list from the 2012 update and removed organizations that have moved away, lost their exempt status, or become defunct. New organizations, organizations that have regained their exempt status, and organizations that moved to the city have been added. Other minor alterations were made, including the addition of several organizations that were not in an arts-related code and had been missed.

EMPLOYMENT IN THE FILM INDUSTRY

METHODOLOGICAL CHALLENGES

Since the state of Louisiana passed the Motion Picture Incentive Act in 2002, there has been a great deal of interest in tracking the economic benefits associated with the incentives. There have been several studies that have tried to estimate the economic impacts of the state's motion picture tax credits, and the proliferation of state film incentives across the country has led to a plethora of other studies on the economic impacts of these incentives.

A wide variety of measures are used in these reports to track economic impacts. These range from complex input-output models to simple figures based on the reported expenditures of productions. Most of these studies, including the ones completed in Louisiana, also try to estimate direct employment.

Most of these studies start by defining the motion picture industry. The most common definition includes the following industries:

- NAICS 51211: Motion Picture and Video Production
- NAICS 51212: Motion Picture and Video Distribution
- NAICS 51210: Postproduction Services and Other Motion Picture and Video Industries

A number of studies also include a fourth category:

- NAICS 7115: Independent Artists, Writers, and Performers.

Often existing studies rely on Department of Labor's Quarterly Census of Employment and Wages (QCEW) to identify employment levels in each of these NAICS codes. Some studies rely on the QCEW exclusively. This data source only includes wage or salary employees covered by the unemployment insurance system.

These studies of the direct employment associated with the film industry in the state have many flaws:

- *The role of Entertainment payroll companies:* In the Entertainment industry it is common practice to work through specialized payroll companies that are typically considered the "employer of record" for the production company. These companies process paychecks and pay all payroll taxes, unemployment insurance, and workers' compensation insurance. These companies often also provide very specialized services to the industry, including complex union requirements. As a result of this arrangement, many of the jobs in the film industry are actually counted under *NAICS 5412: Accounting, Tax Preparation, Bookkeeping, and Payroll Services in state and federal industry statistics .*

  The clearest evidence of this can be found in the cross-industry occupational employment estimates published annually by the U.S. Bureau of Labor Statistics: in 2012, about 15,400, or 22%, of the nation's actors were employed by accounting, tax preparation, bookkeeping, and payroll services firms. This was higher than the number of actors employed by performing arts companies (8,990), and second only to the number who were employed in the motion picture and video industries (34,620)

- *Loan-out corporations and independent artists, writers, and performers:* An additional complexity in the film industry is the establishment of so-called "loan-out corporations" by entertainers and actors. These corporations are established by an individual entertainer and the entertainer is paid wages through the corporation. This employment is captured in the NAICS code 711510 - "independent artists, writers, and performers." However, there are many other types of economic activity included in this NAICS code. Thus, while a portion of the NAICS code 711510 is probably related to film production, not all of it is.

- *Freelance work and the self-employed:* A significant number of the workers who contribute to film and television productions in New Orleans are not wage employees covered by the unemployment insurance system and thus not captured in the QCEW data, the source for many of the studies on the economic impact of the film industry. To fully capture the economic importance of film production, it is thus crucial to look at freelance jobs.

ESTIMATING DIRECT JOBS IN FILM- AND TV-RELATED ACTIVITY IN NEW ORLEANS

As part of this update, an effort was made to identify ways to better capture the job impacts associated with film and TV production through conventional secondary data sources. Contacts were made with staff at the Louisiana Department of Labor and the U.S. Department of Labor who were knowledgeable about their agency's data collection process, but because of confidentiality concerns they would not release any details on how motion picture and video related establishments and workers were being categorized. While precise data are not available, it is still clear that any estimate which uses only

covered employment in the NAICS codes for motion pictures and video industries will understate the actual number of jobs associated with film and television productions in New Orleans:

- With the growth of the film industry in Louisiana, a number of national entertainment payroll companies have opened offices in New Orleans, including CAPS Payroll, Ease Entertainment Services, and Entertainment Partners. Local companies offering similar services have also emerged. Employment in the payroll services industry (NAICS code 541214) increased from 174 jobs in 2002 to 733 in 2013. By 2013, the location quotient for this industry in New Orleans was 2.89, a very high relative concentration.

- In New Orleans there are an estimated total of 2,679 jobs in the NAICS code "Independent Artists, Writers, and Performers." The vast majority of these jobs reflect self-employment or part-time freelancing . It is difficult to precisely estimate how many of these jobs are related to the film industry since the category groups together writers, photographers, editors, painters, dancers, actors and a variety of other arts- and Entertainment-related occupations.. But using EMSI's staffing patterns table, a relatively conservative estimate would be that about 20 % of these jobs in New Orleans are associated with film and television productions.

If one looks only at covered employment in the traditional categories used to define the film and video industries there are only about 2,370 jobs:

Covered Employment (QCEW)		
512110	Motion Picture and Video Production	2,184
512199	Other Motion Picture and Video Industries	183
512191	Teleproduction and Other Postproduction Services	<10
512120	Motion Picture and Video Distribution	<10

However, we would estimate that with the addition of independent artists, writers, and performers, other freelancers, and workers employed through payroll companies there are actually closer to 3,600 direct jobs in the industry.

EMSI Complete Employment		
711510	Independent Artists, Writers, and Performers (20% of total)	536
512110	Motion Picture and Video Production	2,326
512199	Other Motion Picture and Video Industries	183
512191	Teleproduction and Other Postproduction Services	48
512120	Motion Picture and Video Distribution	26
541214	Payroll Services (excluding an estimated 244 non-Entertainment related jobs) [45]	489
	Total	3,608

[45] Entertainment payroll company employment was estimated by subtracting from total payroll services employment (733) the number of payroll services jobs New Orleans would have had if the industry had a 2002-2013 growth rate equal to the national average for the industry (244).

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