



**NEW ORLEANS
BUSINESS ALLIANCE**
for **ECONOMIC DEVELOPMENT**

RE-IMAGINING JAZZLAND

Strategic Opportunity Analysis of Jazzland/Six Flags and New Orleans East

JUNE 2019



TIP
strategies



PERKINS+WILL

ACKNOWLEDGMENTS

- The City of New Orleans**
The Honorable Mayor LaToya Cantrell
- New Orleans Business Alliance**
- The Stakeholders and Citizens of New Orleans**

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01

INTRODUCTION

BACKGROUND AND CONTEXT

To assess the strategic opportunities for Jazzland and its surrounding parcels, the New Orleans Business Alliance (NOLABA) hired a team from TIP Strategies and Perkins+Will. Over a six-month process, the team reviewed relevant research and market data, conducted targeted stakeholder input, analyzed strategic opportunities, and made recommendations on a path forward to realize the highest-impact opportunity within the site and market constraints.

The study area includes the 162-acre site that was originally developed as the Jazzland

amusement park, subsequently named Six Flags New Orleans. It also includes surrounding parcels that are undeveloped. The study area is located at the 510 and I-10 interchange and can be accessed from Lake Forest Boulevard and Michoud Boulevard.

To better understand the market context, the project team also reviewed the conditions of New Orleans East and its primary commercial corridors of Read, Crowder, and Bullard, which is further detailed in the appendix.



Figure 1. Map of Study Area

Source: City of New Orleans, GIS

THE PAST

The story of the Jazzland area and the site's redevelopment opportunities encompass the history and challenges of the City of New Orleans and is positioned to represent its future. The area was wetland until the construction of the flood-protection system by the US Army Corps of Engineers in response to Hurricane Betsy in 1965. Fueled by the oil boom of the 1970s, New Orleans East flourished as a suburb of choice, and it developed into an important retail and employment center, with Lake Forest Plaza drawing visitors and shoppers from around the region. The three interchanges along I-10 east of Paris Road are emblematic of a vision for growth for New Orleans East, but this growth never materialized due to the decline of the oil industry in the 1980s.

The Jazzland amusement park opened in 2000 with the intention of creating jobs and expanding the tourism sector into New Orleans East. However, five years and two owners later, the park closed for Hurricane Katrina and never reopened. The amusement park buildings and rides remain on the site, heavily vandalized, neglected, and open to the elements.

The impact of Hurricane Katrina on the City of New Orleans cannot be overstated. Between 2000 and 2010, the City of New Orleans lost almost 30 percent of its population. Although the city's population has recovered somewhat in recent years, it is still about 80 percent of its 2000 population and 63 percent of its peak population in 1960.



Hurricane Katrina had devastating impacts on Jazzland. After the storm, the park stood in four to seven feet of water for four months and never reopened. Almost 15 years after the storm, the park still sits abandoned in the aftermath of the storm. It is a public safety hazard and incurs expenses to secure the site.

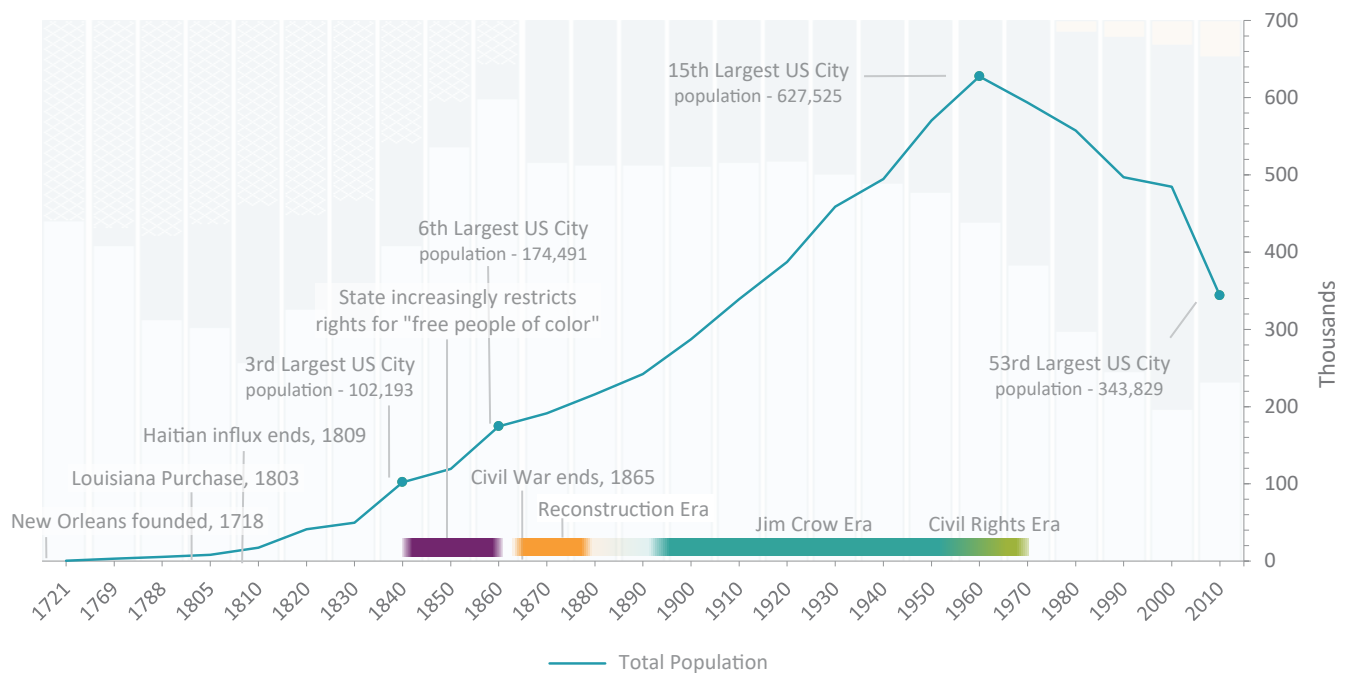


Figure 2. Total Population, City of New Orleans (1721 - 2010)

Source: The Data Center, Prosperity Index.

Likewise, the employment base of the New Orleans Metro contracted by about 20 percent after Hurricane Katrina. As of 2018, the region had about 90 percent of the jobs it had before Hurricane Katrina. The hardest hit sectors were education, manufacturing, and retail trade. Lodging, restaurants, and bars; professional services; and healthcare are the only sectors to have experienced significant job gains over their pre-Katrina levels.

The strength of the tourism and healthcare sectors has contributed greatly to the city's recovery. Growth in these two sectors has spurred redevelopment activity, particularly around the epicenters of the sectors - the French Quarter and the Downtown Bio District. Major development projects include approximately 2,800 new hotel rooms and expansions of the Ochsner Health System, University Medical Center, the New Orleans VA, and Children's Hospital.

The tourism sector, in particular, has bolstered the regional economy during its recovery. According to a recent study by DKSA, in 2017 the tourism sector attracted 17.74 million visitors, who spent \$8.79 billion. This level of visitation supports expanded retail opportunities along the riverfront, additional hotel rooms, and an array of amenities from cultural institutions to restaurants to music venues.

The population of New Orleans East has grown an impressive 18 percent since 2010, after suffering population loss following Hurricane Katrina. However, it is still 79 percent of its population in 2000. As it lies outside of the epicenters of the tourism and health sectors, New Orleans East has not benefited as much from the recovery led by these two sectors. Many of the store fronts and retail centers along Read, Crowder, and Bullard remain vacant, and an estimated 3,000 housing units are unoccupied.

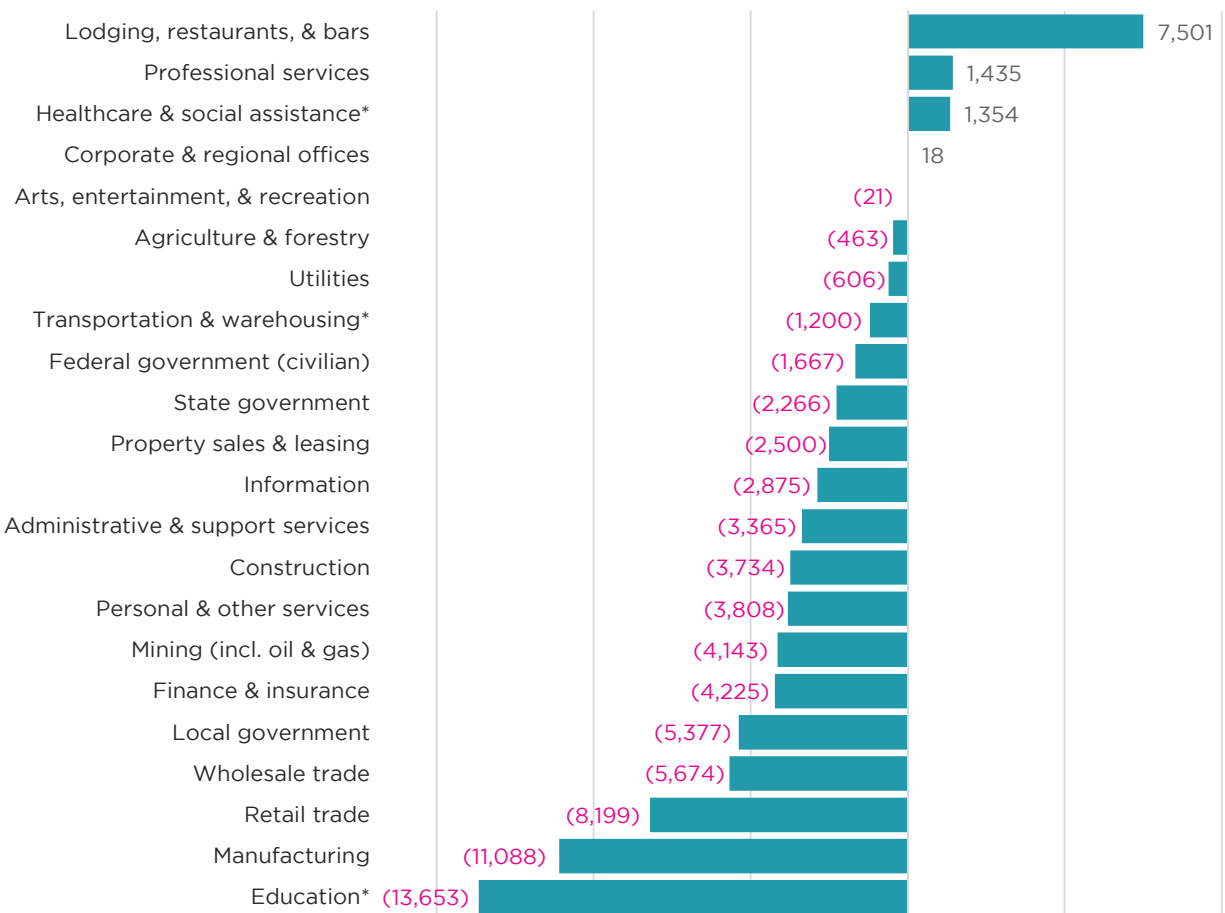


Figure 3. Net Change in Jobs Since Hurricane Katrina (2004-2018), Greater New Orleans

Source: EMSI 2019.1 – QCEW Employees, Non-QCEW Employees, and Self-Employed

*Note: Includes related public-sector employment (e.g., education includes public schools, colleges, and universities; healthcare includes public hospitals; and transportation and warehousing includes US Postal Service workers)..



THE FUTURE

Over the next five years, the economic recovery of the New Orleans Metro Area is expected to resume. Healthcare; lodging, restaurants, and bars; and arts, entertainment, and recreation are expected to add the largest number of new jobs. Education as well as transportation and warehousing are also expected to be sources of growth.

As New Orleans East is one of the most affordable neighborhoods in New Orleans, it will likely see more population growth, which could support additional retail opportunities to help absorb excess space. New and expanding businesses such as Dixie Brewing, Starlight Studios, and LM Wind Power will bring new jobs to the area. New retail locations including PJs Coffee and AT&T will hopefully send strong signals to attract other retailers to the area. Another positive trend is the continued investment by area churches, such as the \$30 million campus of the Franklin Avenue Baptist Church, and the activity generated by their congregations. Combined, these trends create positive momentum for New Orleans East.

In addition, New Orleans East is home to Bayou Sauvage, the nation's second largest urban national wildlife refuge (after the Don Edwards San Francisco Bay National Wildlife Refuge). Bayou Sauvage is a wetland habitat, rich in wildlife and recreation opportunities, and is strategic to efforts to

protect neighborhoods in New Orleans and other parishes along Lake Pontchartrain from hurricane surges. It is also on the front line of Louisiana's changing coast.

The Coastal Protection and Restoration Authority of Louisiana projects that 19 percent of New Orleans East will experience land loss between 2017 and 2027. Bayou Sauvage and the surrounding parcels around Jazzland will be some of the hardest hit areas in all of New Orleans. The Low Scenario 10-year estimate shows a projected land loss of 75 percent for the study area and of 62 percent for the Jazzland site itself. The map of this projected land loss is shown in [Figure 4](#). The Authority warns that if we do not aggressively address this crisis, the problem will intensify.

Land loss and living with water is part of the future of New Orleans East. The Resilient New Orleans Strategy lays out a vision for a future New Orleans: "[a city] that is responsive to our delta and coastal geography, locally forged and globally connected, and founded on the equity of opportunity and social mobility." It is a city where "the dynamic urban landscape... is aligned with its natural environment..." The redevelopment of Jazzland has the potential to promote the vision of Resilient New Orleans and achieve a balance between community goals, economic opportunity, and environmental responsibility to enhance the vitality of New Orleans East.

We must plan for a future that is responsive to our coast and show the world what it looks like to live with water.

- **Advance innovation and education.**
Create a center of gravity for New Orleans' water economy, based on resiliency and sustainability, that provides opportunities for applied research, innovation, and education.
- **Minimize environmental impact.**
Concentrate building footprints in areas not impacted by land loss.
- **Create economic value.**
Leverage the unique location to create an immersive education destination that explores the changing coast while generating community benefit for New Orleans East.



Figure 4. New Orleans East Low Scenario 10-year Land Loss Estimate, 2017 - 2027

Source: Coastal Protection and Restoration Authority of Louisiana



02

THE OPPORTUNITY

OPPORTUNITY ANALYSIS

Each opportunity was evaluated based on goals that were articulated by community stakeholders.

These goals were:



Job creation

Provides new economic opportunities



Catalytic potential

Has the ability to spur additional investment and market activity



Reflects the community / Community connection

Provides opportunities for community members to participate, as business owners, as employees, as neighbors



Family-oriented

Is an amenity for families to use or benefit from



Community returns on investment

Realizes tangible and measurable benefits for the neighborhoods

Three different opportunities were evaluated: tourism, higher education, and transportation and distribution. These opportunities were chosen because of the strength of these sectors in the regional economy and their demonstrated resilience in the face of business cycles and natural disaster.

Based on the evaluation against the community goals, the opportunity that emerged was a blend of higher education and tourism. Although transportation and distribution is the opportunity that would create the most and best jobs and have the highest potential economic impact, community stakeholders communicated that this use would be better suited for the land in the existing industrial areas adjacent to the Industrial Canal and south of Chef Menteur Highway.

The team and the stakeholder groups recognize that the tourism sector has its challenges - namely job quality and cyclicity. However, the number of visitors to New Orleans supports a much more robust network of community amenities (retail, restaurants, cultural institutions, etc.) than the residents of New Orleans could support with its current population. In this context, tourism would serve as a tool that can be leveraged to develop and support high-quality community amenities that New Orleans East residents want and that, in turn, can attract additional talent and businesses to New Orleans East neighborhoods.



THE OPPORTUNITY

AN EDUCATION DESTINATION

Based on the market context, the study area conditions, and input from stakeholders, the redevelopment opportunity for Jazzland with the highest potential to promote the community goals is an “education destination” that merges the benefits of the higher education and tourism sectors. The destination will be centered on the story and science of resiliency and climate change, providing research, innovation, education, and exploration opportunities. These opportunities will further and promote our understanding of living with water and propel New Orleans to be a leader in the global water economy. The main themes would include:



Education & Research

The education and research element would include a consortium of higher education, private industry, the public sector, and foundations that research topics related to resiliency and climate change with a focus on innovations and discoveries that have commercial applications that could spur additional business activity. This consortium could serve as an anchor for the water economy in New Orleans, which has been identified as a regional priority. The site could become a research center and demonstration project for living with water - a living lab for the technologies, design, and policies needed to foster resilient communities. In addition, there could be classroom space for on-site courses on relevant topics that promote an understanding of resiliency planning and living with water.



Educational Entertainment & Tourism

The educational entertainment and tourism element would include family-friendly attractions, lodging, tours, venue/event space, and amenities that provide immersive education experiences on coastal science, climate change, and resiliency. This element would attract visitors of all ages, generate revenue that could support education and research, and contribute to the vitality of New Orleans East.



Inclusion and Economic Opportunity

Intentional linkages between New Orleans East residents and the destination would maximize the social and economic impact of this project. Wealth-building opportunities, including business development and employment, would inject dollars into the New Orleans East neighborhoods. In addition, a special purpose district could capture revenue for reinvestment back into the nearby commercial corridors (Lake Forest, Read, Crowder, and Bullard). These linkages would be transformative for New Orleans East.



Minimal Environmental Impact

This destination has the potential to promote resiliency and capitalize on the tourism industry, while minimizing environmental impact and bringing new vitality to New Orleans East.

The building footprints would be limited to the areas of the site that have already been disturbed in prior development and that are not likely to be subject to land loss. In addition, buildings and features would be designed to concentrate the more invasive activities in these areas. This would help to minimize the environmental impact of the development while leveraging the unique ecological advantages of the surrounding properties as tourism excursions, educational opportunities, and research sites and as areas to support research.

THE OPPORTUNITY

AN EDUCATION DESTINATION

The destination would consist of three zones.

The Trailhead

The Trailhead would be the main education and tourism locus and serve as a gateway to education, ecotourism, and adventure excursions beyond.

The Excursion Zone

The Excursions would take place on the surrounding parcels, in Bayou Sauvage, or in some of the surrounding natural amenities in the region, providing a means of capturing visitor spending and celebrating the unique ecology, culture, and the people of New Orleans and New Orleans East.

Community Connections

Linkages would be integrated into the design and programming to connect the destination with New Orleans East amenities such as Joe Brown Park and the Audubon Nature Center as well as future amenities like a redeveloped Lake Forest Plaza and Lincoln Beach.

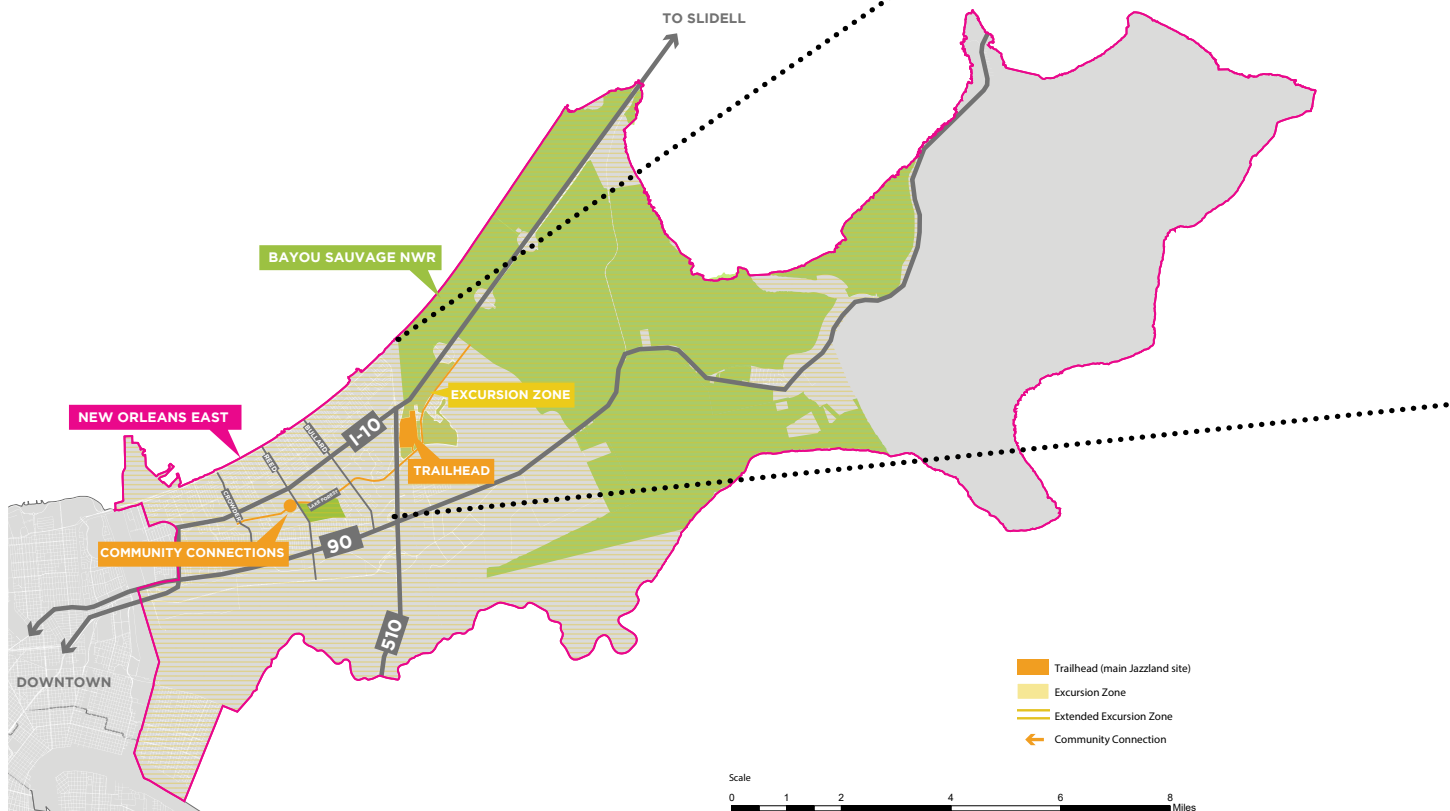


Figure 5. Regional Opportunity Diagram

Source: New Orleans GIS

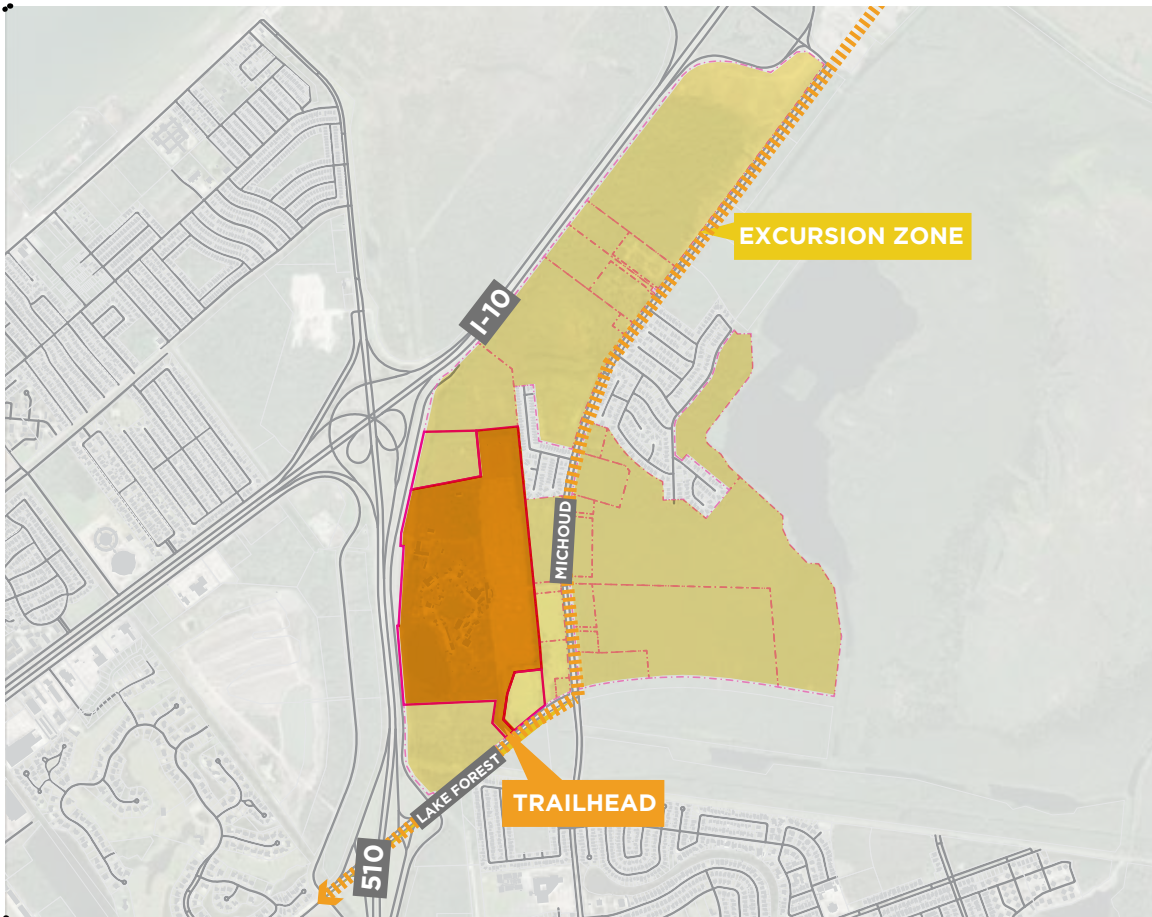


Figure 6. Study Area Opportunity Diagram
Source: New Orleans GIS



THE TRAILHEAD

The Trailhead should be located on the main Jazzland site and serve as the epicenter of learning about climate change and coastal resilience. It should function as a gateway to the Excursion Zone and Bayou Sauvage. As a destination, it should provide accommodations that honor the landscape of the New Orleans coastal marshland. The physical design should maximize economic opportunity and community benefits, while minimizing environmental impact.



TRAILHEAD PROGRAMS

Some potential activities could include:



Figure 7. Preliminary Site Diagram



Education and Experience Center

An experiential learning and research center to inspire current and future scientists about resiliency and climate change through entertaining exhibits, experiences, research, and programming.



Adventure Pavilion

An adventure pavilion that provides a staging area for tour operators for a wide variety of nature-based or outdoor excursions and activities that could take place on the surrounding parcels, in Bayou Sauvage, or in some of the surrounding natural amenities in the region.



Resort + Conference Center

A resort hotel and conference center would provide tourists and conference goers with a nature based alternative to the well-known, city life of downtown New Orleans and a new venue for events such as family reunions and weddings. Views and amenities could spotlight the gateway to Bayou Sauvage.



Water Play

Family-friendly amenities could include pools and other water features like splash pads or a lazy river.



Amphitheater

A community destination spotlighting what New Orleans knows best - music! A state of the art venue would add a new dimension to New Orleans East's quality of life and also add to the economy. Being able to host entertainment with such a breathtaking background will attract visitors, celebrate community, and tell the story of New Orleans' beautiful resilience.



Garden + Interpretive Walk

Ideal for families with strollers or visitors in wheelchairs, this garden could feature local flora and fauna, excite the senses, and provide opportunities for nature exploration, play, and learning.



Lakeside Amenities

The community expressed a desire to see restaurants, shops, and other amenities. Capitalizing on the influx of visitor spending, the area could support multiple dining and retail facilities, as well as spaces for markets, exercise classes, exhibits, and temporary programs adjacent to the on-site lake.



Conference Center

Advent

PRIVATE AIRBO
EXPERIENCE THE MA

NOE
Rentals

Amphitheatre
Welcome Center
CARING FOR WETLANDS
As summer is climate change



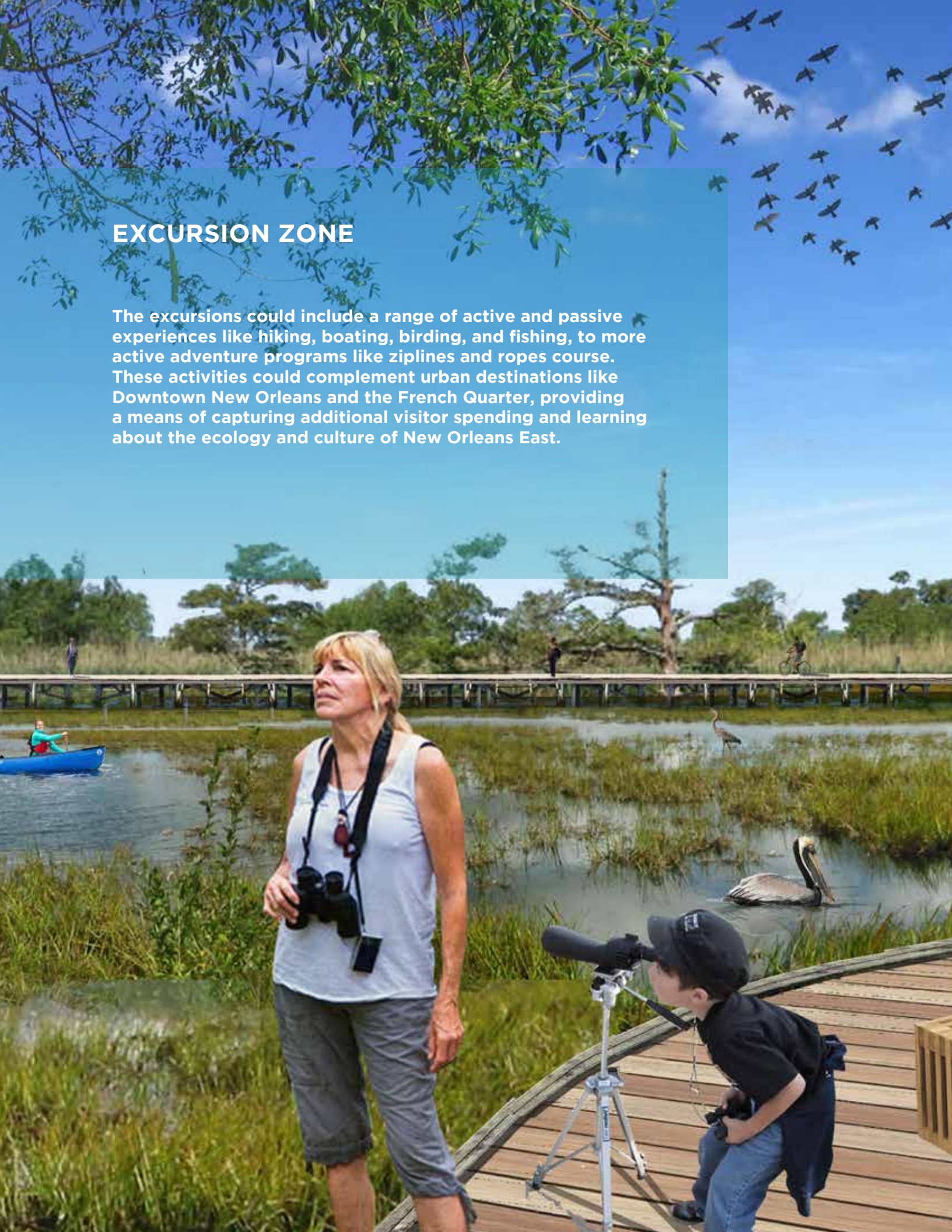
ure Pavilion

Welco

KIDS
KIDS
KIDS

EXCURSION ZONE

The excursions could include a range of active and passive experiences like hiking, boating, birding, and fishing, to more active adventure programs like ziplines and ropes course. These activities could complement urban destinations like Downtown New Orleans and the French Quarter, providing a means of capturing additional visitor spending and learning about the ecology and culture of New Orleans East.





EXCURSION PROGRAMS

Some potential activities could include:



Hiking, Boating, and Fishing

The diverse Bayou Sauvage habitat supports 340 bird species during various seasons of the year. Peak waterfowl populations of 30,000 use the wetland areas during fall, winter, and early spring. There are miles of potential trails to explore as well as a non-motorized boat launch for those who want to fish, canoe, or kayak.



Fresh Water Marsh Tours

Most of Bayou Sauvage is located within massive hurricane protection levees built to protect New Orleans from storm surges and flooding. In addition, the area was massively impacted by Hurricane Katrina killing 90 percent of trees in the bottomland hardwood forest and over 1,700 acres of fresh and brackish marshes. This tour could highlight the importance of restoration and reforestation, while also pointing out special conditions that only exist at Bayou Sauvage.



Surge Barrier Tours

The 1.8 mile-long, \$1.3 billion Lake Borgne Storm Surge Barrier is one of the largest flood barriers in the world and the largest design-build construction project in the history of the U.S. Army Corps of Engineers. The Flood Protection Authority currently schedules tours for school groups, researchers, and other interested parties to visit the surge barrier.



Gentilly Resilience District

This tour could visit the Gentilly Resilience District to inspire residents and visitors of New Orleans to think about how neighborhoods across the country can adapt to thrive in a changing environment. The District is a combination of efforts across Gentilly to reduce flood risk and slow land subsidence.



Ropes Course and Zip Line Tours

This could be a team-building experience with multiple challenges like bridges, balance beams, logs, free fall, cargo nets, climbing towers and more! This could be a family-friendly affair with challenges for all ages. A zipline could propel visitors on an exciting adventure across the natural landscape over alligators, trees, and water.



Big Oak and Little Oak Island Archaeological Tours

The bayou itself was once a major transportation route for early settlers and traders. In fact, there are historical archaeological sites associated with the people of the Tchefuncte culture of the Lower Mississippi Valley, dating from as early as 800 BC to as late as AD 200 located in the marshes of eastern New Orleans today. An excursion to these sites could tell the story of the early settlers.



New Orleans City Tours

For visitors, like families, who may want to limit their time on Bourbon Street, a reverse “city tour” could allow visitors to see the French Quarter and the city without having to stay in the center of all the action.



Community Excursions

Community excursions would explore the best of New Orleans East amenities such as Joe Brown Park and the Audubon Nature Center as well as future amenities like a redeveloped Lake Forest Plaza and Lincoln Beach.

MARKET CONSIDERATIONS AND ECONOMIC IMPLICATIONS

The education destination proposed for Jazzland can diversify the New Orleans tourism product, while promoting a one of a kind educational opportunity. Such a project will educate visitors on resiliency, climate change, and living with water, while providing revenues to support education, research, and strengthening the economy of New Orleans East.

The New Orleans Strategic Hospitality Task Force developed a master plan to reinvigorate the city's tourism economy. One of the key goals of the plan was to attract more younger visitors. This kind of education destination could anchor the family tourism segment outside of the French Quarter while maintaining strong connections with existing family-oriented destinations such as the Audubon Nature Institute, the new Louisiana Children's Museum, and the World War II Museum.

The portfolio of activities at the education destination could extend the stay of this tourism segment and increase the per visitor spend, both through the purchase of additional hotel nights as well as the purchase of tours/activity passes. This would help the New Orleans tourism sector increase its market share among family tourism destinations and help New Orleans attract more younger visitors. Furthermore, the day-time oriented adventures and tours strongly complement the night-centric mix of activities that are currently the focus of New Orleans tourism (food, music, nightlife). Finally, it would provide a new venue and facility that could support events such as family reunions and weddings.

In its 2019 Strategic Leisure Marketing Planning, the New Orleans Tourism Marketing Corporation outlined its strategic priorities. One of these priorities is "driving exposure to every New Orleans neighborhood, beyond the Quarter." By creating a strong anchor in New Orleans East, the destination creates an opportunity to draw visitors out of the Quarter, attract cruise ship passengers, and intercept travelers on I-10 with a compelling stop. This opportunity will certainly bring heightened exposure to New Orleans East and help bring the benefits of the New Orleans tourism economy to New Orleans East.

The education and research component should be positioned to bring in public and private research dollars, spur entrepreneurial and commercialization activity, and attract global experts in resiliency and climate change. The presence of multiple major research institutions in New Orleans, the federal government, and an active philanthropic sector set the stage for the education and research component. The recent expansion of the Water Institute of the Gulf and investments in the Gentilly Resiliency District provide unique opportunities that could be leveraged or expanded to complement the proposed destination. All together, the combination of these assets and activities could help propel New Orleans into a leadership position in the global water economy.

WHO WILL COME?



Lauren and Tenzin

Lauren and her son Tenzin live in New Orleans and are frequent visitors to City Park and Audubon Zoo. They would visit a destination with access ropes courses, museums, and adventure tours at least once a month if the programming and facilities were interesting and engaging. They would also consider an annual pass or membership if one was affordable for locals. Lauren is a nonprofit executive and mentor, and would hope to be able to arrange visits to the park for the students she mentors or host retreats with her board members and corporate partners. She is also considering buying her first house and would strongly consider New Orleans East if a destination amenity like this was a part of the community.



Nora and Matthew

Nora and Matthew are birding enthusiasts in their early 30s. They regularly travel to destinations across the US to view birds on their migratory paths. Having visited the Santa Ana Wildlife Refuge, where they struggled to find accommodations, they would welcome an opportunity such as Bayou Sauvage. Bayou Sauvage offers rich birding experiences adjacent to a renowned tourism destination, which provides ample activities to fill these birders time when the birds are not active. They could go on a boat trip, visit the French Quarter or museums, eat wonderful meals, and still be back in Bayou Sauvage at the right hours to view the species of birds they travel to see.



The Pullas Family

The Pullas Family is from Denver, Colorado - Andrea, Carlos, Nicolas (age 12) and Sofia (age 10). For Spring Break, they passed through New Orleans on their road trip to the warm, sunny beaches of the Florida Panhandle. They stopped to experience the history of the French Quarter, the taste of beignets, and, most importantly, the sight of an alligator. On their one-night/two-day stay, they went on a Swamp Tour, walked the cobblestone streets of the French Quarter, and sampled Cajun cuisine. They enjoyed their stay, but they wished for more outside activities and a less structured way to enjoy the natural landscape and search for alligators. They also were interested in fishing and hiking.

MARKET CONSIDERATIONS AND ECONOMIC IMPLICATIONS

The potential economic implications of the project would be significant.

Based on the proposed uses, the destination could create **between 200 and 300 direct jobs**. For every one of these direct jobs, there will be almost another full job created (indirect and induced).

Thus, the project could lead **to total job creation of 380 to 570 jobs**. Note: this estimate of job creation does not include estimates of jobs related to tour operators.

The destination would generate revenues related to research and education. Similar research institutes and consortia, such as the

Water Council in Milwaukee and the Pecan Street Project in Austin, have generated **\$2 to \$3 million** in revenues through **research grants, sponsored research**, and other programs/activities.

The destination will also generate visitor spending. If it attracted only 1 to 3 percent of New Orleans visitors, or **180,000 to 440,000** visitors, and those visitors spent an average of \$250 each, it would inject **\$45 million to \$110 million** into the New Orleans economy. If those visitors spent the New Orleans visitor average of about \$500, this would inject **\$90 million to \$220 million into the local economy**.



The destination could create between
380 to 570 total jobs
(direct, indirect, and induced)



\$2 -3 million in research



If the destination attracted 1 to 3 percent of New Orleans annual visitors and they spent \$500 each it would inject
\$90 million to \$220 million
into the local economy

By building in intentional linkages with New Orleans East, the destination can realize a maximum impact on the surrounding neighborhoods. Below are a list of the key economic linkages that should be put into place:

- **Special Purpose District.** Through a special purpose district such as an Economic Development District or Tax Increment Financing (TIF) District, a portion of tax revenue generated from the redevelopment of the Jazzland site could be captured and reinvested back into the New Orleans East commercial corridors. This structure could set the stage for reinvestment in New Orleans East in ways that could support tourism in the district, create additional amenities that New Orleans East residents could enjoy, and provide outlets for visitors to spend dollars directly in New Orleans East.
- **Employment.** A program to connect New Orleans East residents with skills training and jobs related to the destination can ensure that residents from nearby neighborhoods have access to the economic opportunities generated by the project. Implementing programs to establish career pathways and upskilling opportunities can help residents move into entry-level positions and then move up into better jobs.
- **Business development.** A program to connect small business owners, minority- and disadvantaged-business owners, and entrepreneurs with opportunities to do business in the redevelopment can strengthen existing businesses and facilitate business formation. This program could include contractors, tour operators, suppliers/vendors, and other ancillary services that would support the construction of the project and the maintenance and operation of a robust tourism destination.

Through these linkages, the destination will help drive additional investment into New Orleans East and create opportunities for New Orleans East residents to build wealth.

NEXT STEPS

Time is of the essence. To move this concept forward, the City of New Orleans and its partners will need to take the following steps. Preparing the site for redevelopment and master planning the site should take place in the first year and building the coalition should be an on-going activity that starts immediately.

BUILD THE FOUNDATION

BUILD THE CONCEPT

BUILD THE COALITION

1. Build the Foundation: Prepare for Redevelopment

The first step that should take place is to prepare the site for redevelopment by putting in place a plan to move the concept forward and by clearing the site.

- **Plan with Industrial Development Board**

Put in place a plan with the Industrial Development Board that provides for continued security at the site and provides the city with adequate time to fully evaluate and plan for the implementation of this redevelopment opportunity. This would include identifying additional funds for site security and extending the Cooperative Endeavor Agreement, as needed.

- **Clear the site**

Removing existing buildings and equipment is a necessary step whether redevelopment occurs at the site or not. Clearing the site would mitigate the public safety hazard and eliminate the security expense. It would create a more welcoming slate to envision the redevelopment and would send a signal to the community that something is happening at the site. Funds for clearing the site could be available through the Regional Planning Commission's brownfield grant program or through resiliency funds such as Resilient New Orleans' Resilience Projects.

2. Build the Concept: Further Analysis and Design

Next, the concept will need to be further refined and developed. A master plan for the site should consider the following:

- **Market Research and Detailed Market Assessment and Feasibility Analysis**
This would inform the development of a more granular program for the site as well as an implementation plan with a detailed phasing strategy.
- **Continued Stakeholder Engagement**
Extensive community engagement should continue throughout the design and implementation process so that the program and character of the proposed development is informed by the community's vision.
- **Implementation and Phasing**
In order to ensure the implementation of large-scale regeneration projects, they need to be broken down into manageable project components.
- **Fiscal Impact and Partner Identification.**
Finally, this step should include a formal economic and fiscal impact analysis to provide a basis for the City's participation in the project in a way that guarantees positive returns on the City's investment and for New Orleans taxpayers.

3. Build the Coalition: Champions, Community and Awareness Campaign

Finally, a coalition of project supporters will need to be assembled to move the concept forward. This will entail the following steps:

- **Champion Identification and Engagement.** Champions should be identified who are important stakeholders and have the influence and/or resources to move this project forward. These champions should include key developers, land owners, business owners, philanthropists, media outlets, public sector representatives, and elected officials whose buy-in and support will be instrumental in realizing the redevelopment project. This group should be engaged strategically with the purpose of leveraging the network and resources of the champions to ensure the project's success.
- **Community Engagement.** A mechanism such as a community task force or advisory committee could be put in place to ensure a broader base of New Orleans East residents have opportunities to provide input into the project design, to partner financially, and have a seat at the table throughout the redevelopment process.
- **Awareness Campaign.** Build awareness of and support for the project by creating a web presence for the project and developing a public relations strategy that will keep stakeholders informed and excited.

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An architectural rendering of a modern building with a perforated metal facade, identified as the Adventure Pavilion. The scene is set outdoors with trees in the background and birds flying in the sky. In the foreground, a diverse group of people, including children and adults, are walking and sitting on a paved plaza. A digital information kiosk is visible on the left side of the image.

Adventure Pavilion

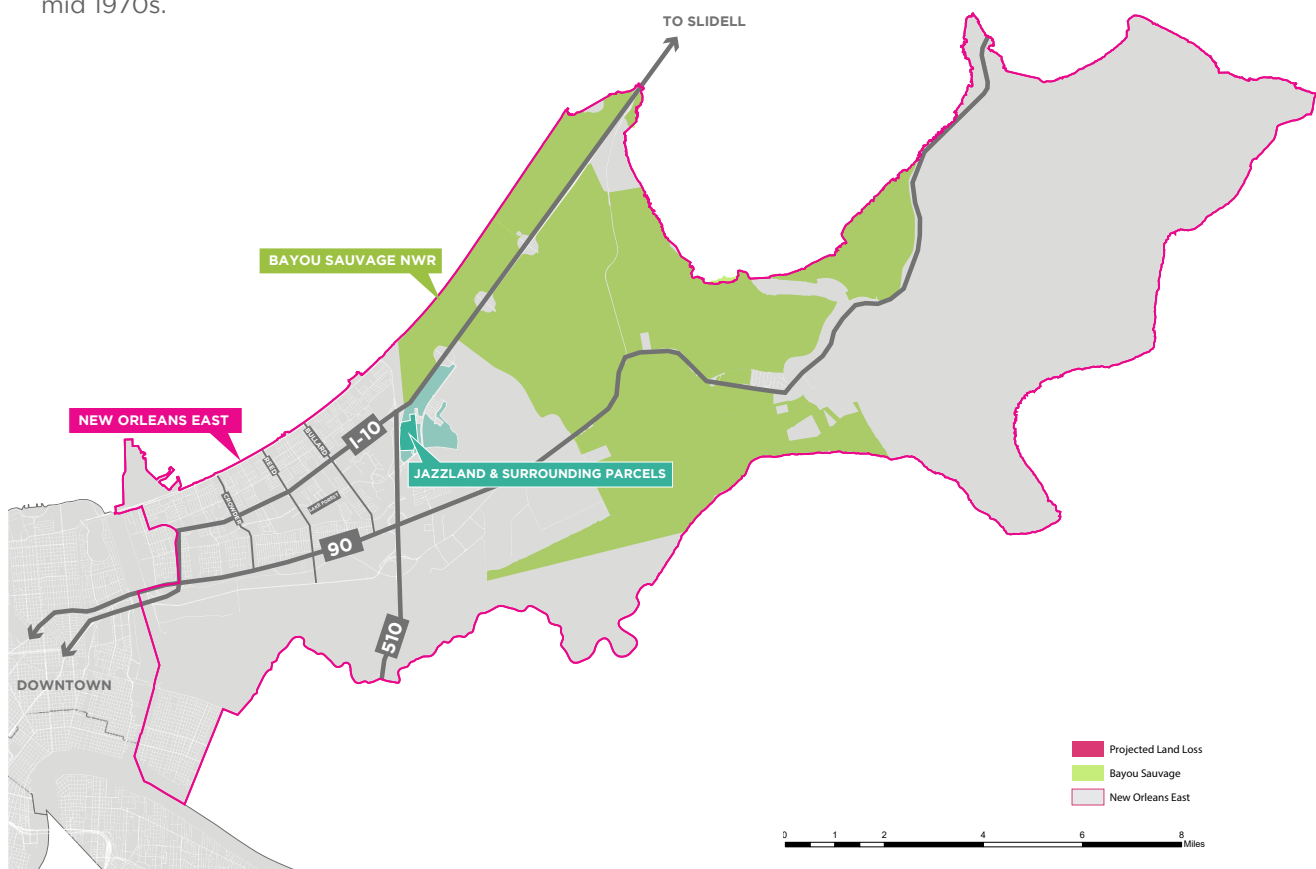
Appendices

APPENDIX A - SITE HISTORY AND BACKGROUND

Until the 1960s, the study area was wetland. The area became “developable” with the construction of the flood-protection system by the US Army Corps of Engineers in response to Hurricane Betsy.

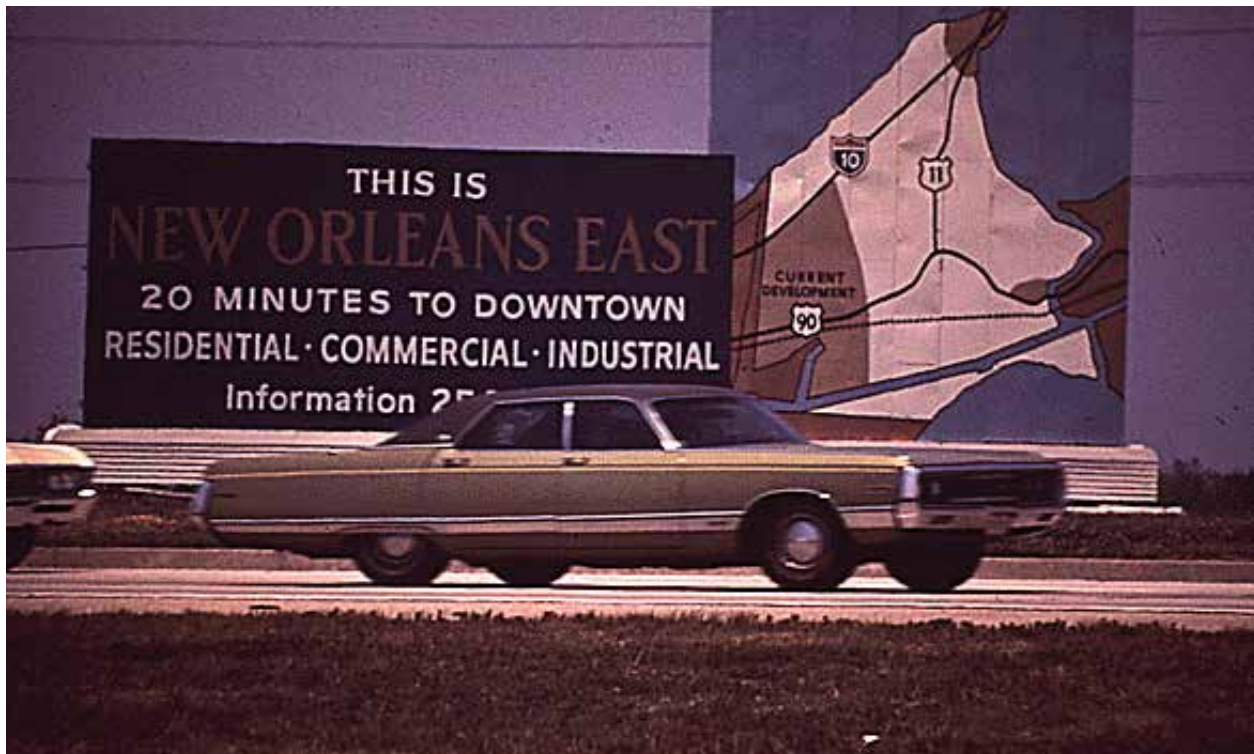
Over the course of the 1970s and 1980s, New Orleans East developed in the suburban-style typical of the time. Residential developments were often organized around lakes, which offered scenic views and served as a stormwater management feature. Buried utilities provided an upgraded aesthetic. Over time, the area grew as a regional retail and employment center. The Plaza at Lake Forest was the largest regional mall in Greater New Orleans at the time of its completion in the mid 1970s.

Fueled by the oil boom of the 1970s, even more development was envisioned for New Orleans East, and the interchanges along I-10 east of Paris Road were constructed in anticipation of this growth. However, only the first interchange at Michoud Boulevard was ever used. Much of New Orleans East became the Bayou Sauvage National Wildlife Refuge, which was established in 1990 under the Emergency Wetland Act. It encompasses approximately 25,000 acres and is the second largest urban refuge in the US.



In 1998, the City of New Orleans began construction of the Jazzland amusement park, on the interchange at I-10 and 510. The park opened in 2000, and Six Flags purchased the theme park out of bankruptcy in 2002, renaming it Six Flags New Orleans. Over the next three years, Six Flags upgraded the park and installed new rides, in accordance with its lease agreement with the City. However, the park suffered significant damage during Hurricane Katrina and the subsequent flooding. The park closed for Hurricane Katrina and never reopened as insurance claims were settled and Six Flags filed for bankruptcy over the years after the storm.

In 2009, the City of New Orleans terminated its lease agreement with Six Flags and control of the property was given to the Industrial Development Board (IDB). This action opened the site up for redevelopment. Though a number of proposals have surfaced, most notably an outlet mall, no proposals have moved forward, and the IDB decided not to move forward with any of the proposals that were made to purchase the property outright. In 2017, the IDB handed over redevelopment responsibility of the site to the City of New Orleans through a Cooperative Endeavor Agreement.



This billboard advertised the anticipated development planned for New Orleans East.

Source: By John Messina - This media is available in the holdings of the National Archives and Records Administration, cataloged under the National Archives Identifier (NAID) 544287.

APPENDIX B - REGIONAL CONTEXT: ECONOMIC AND MARKET OVERVIEW

Population

As of 2017, the City of New Orleans had a population of 393,292, which accounts for 31 percent of the population in the Greater New Orleans Metropolitan Area. The Metropolitan Area includes Jefferson, Orleans, and St. Tammany Parishes.

Although the population of both the City and the metro area declined between 2000 and 2010, both geographies have returned to positive population growth. In fact, between 2010 and 2017, the City of New Orleans grew 14 percent and the metro area grew 7 percent.

While recent population growth trends have been positive, it is important to note that the population of the City of New Orleans has been declining since its peak of 627,525 residents in 1960. Hurricane Katrina certainly

had a marked impact on the City's out-migration, and the population has rebounded to an extent. Yet, the City's population remains about two-thirds of what it was at its peak. This means that the capacity of the City's built environment and infrastructure is for a much larger population.

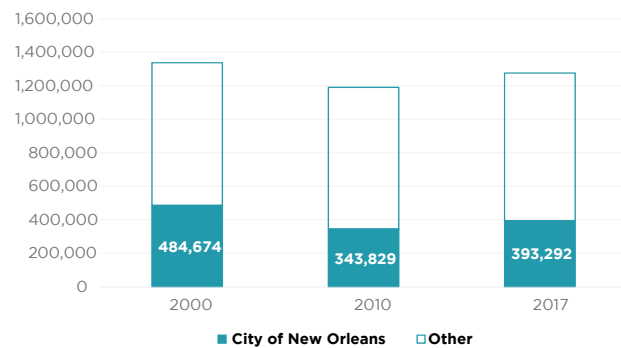


Figure A1. Population, Greater New Orleans (2000 - 2017)
Source: US Census Bureau, Population Estimates Program

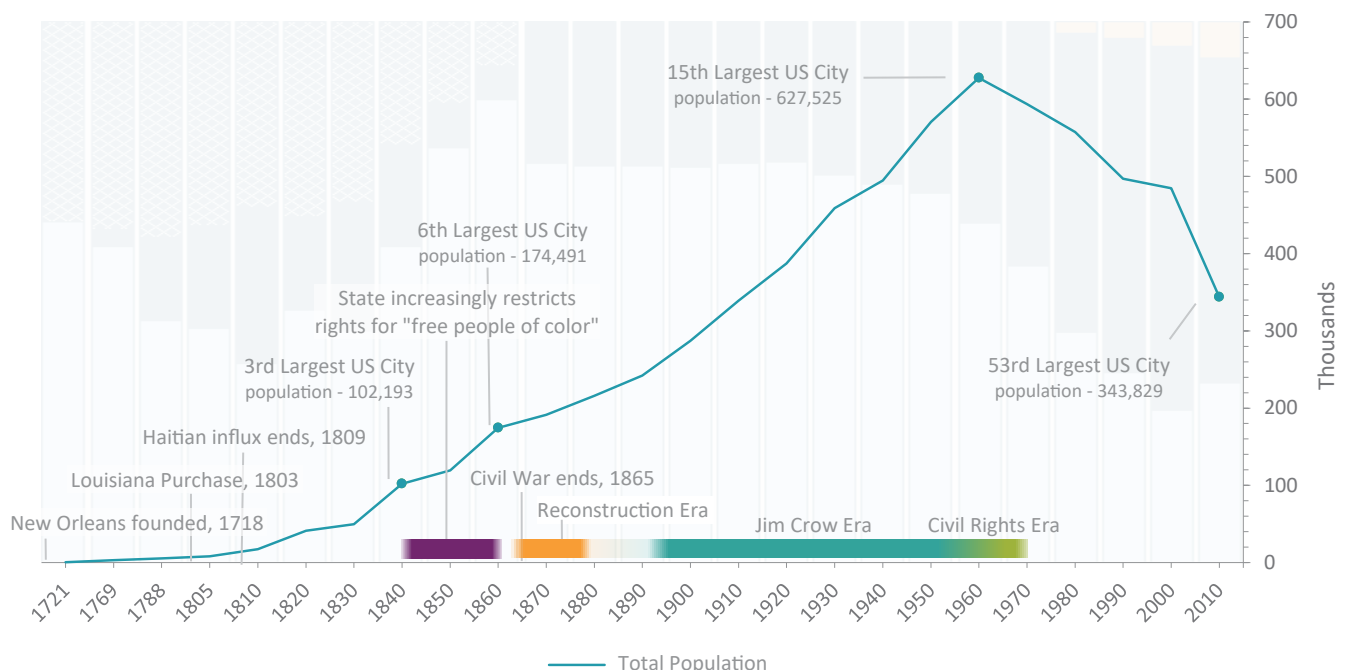


Figure A2. Total Population, City of New Orleans (1721 - 2010)
Source: The Data Center, Prosperity Index.

Employment and Industry

The Greater New Orleans regional economy includes more than 600,000 jobs. The largest sectors are healthcare; lodging, restaurants and bars; retail trade; and education. These four sectors account for 45 percent of the economy.

Relative to the US economy, Greater New Orleans has high concentrations of employment in sectors related to oil and gas, tourism, and transportation. These high concentrations are reflective of the regional strengths in these particular sectors.

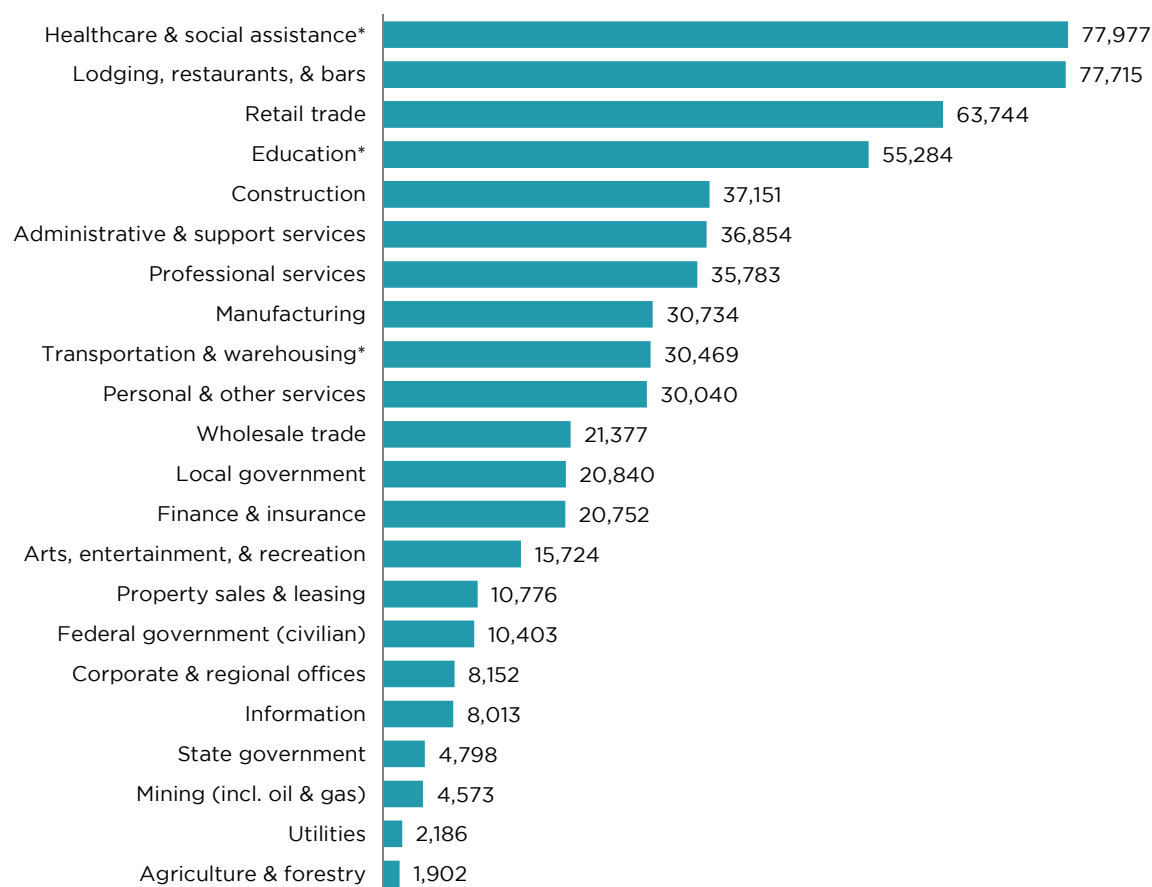


Figure A3. Job Base by Industry Sector, Greater New Orleans (2018)

Source: EMSI 2019.1 – QCEW Employees, Non-QCEW Employees, and Self-Employed

*Note: Includes related public-sector employment (e.g., education includes public schools, colleges, and universities; healthcare includes public hospitals; and transportation and warehousing includes US Postal Service workers).

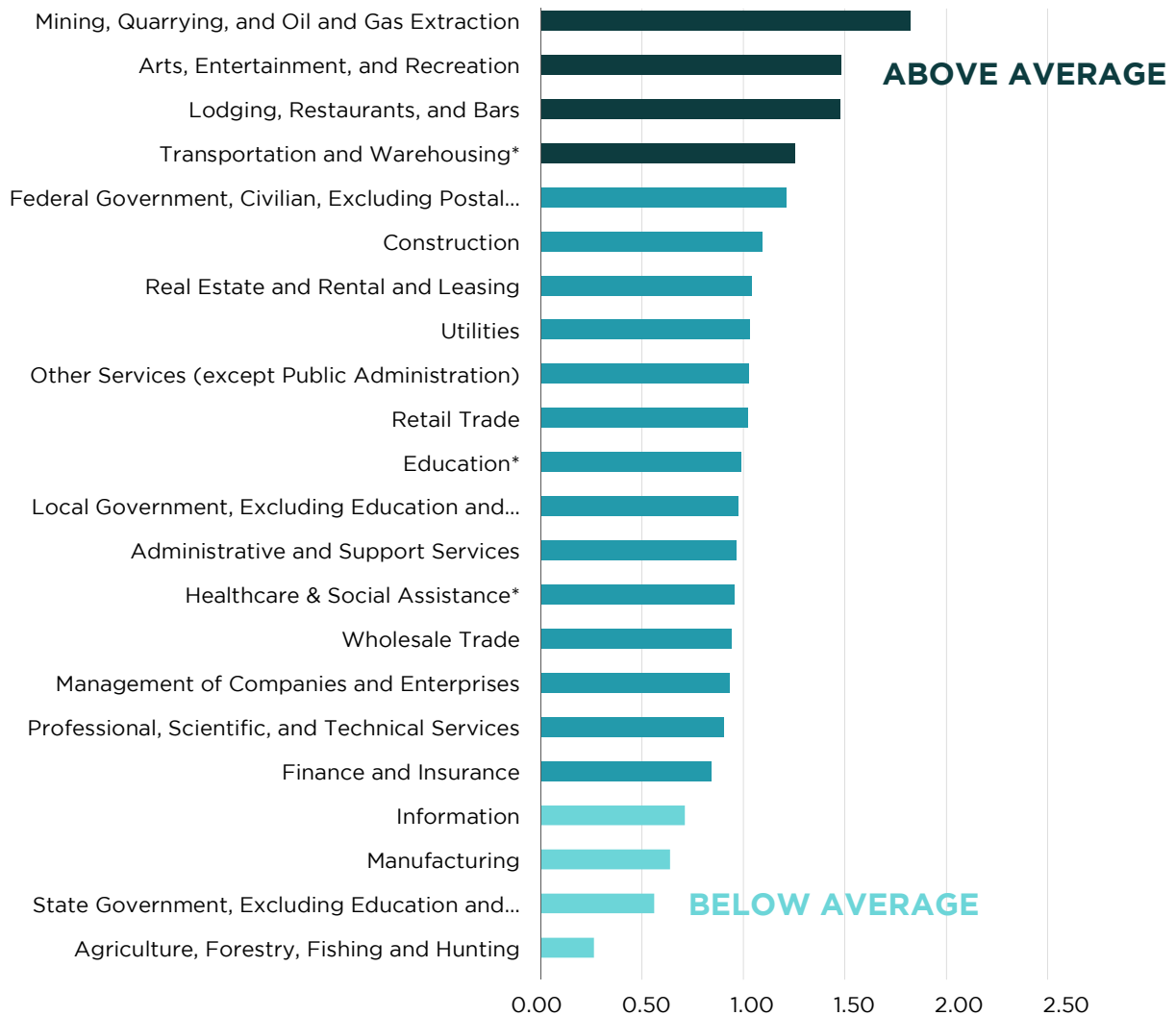


Figure A4. Industry Concentration (Location Quotient), Greater New Orleans

Source: EMSI 2019.1 – QCEW Employees, Non-QCEW Employees, and Self-Employed

*Note: Includes related public-sector employment (e.g., education includes public schools, colleges, and universities; healthcare includes public hospitals; and transportation and warehousing includes US Postal Service workers).

The regional economy was hard hit by Hurricane Katrina, when it lost 20 percent of its employment base, but proved to be resilient during the Great Recession, when employment declined only 1 percent. As of 2018, the regional economy had recovered to almost 90 percent of its pre-Katrina employment level, which equates to 68,000 fewer jobs in 2018 than in 2004.

During this time period (2004 to 2018), the education, manufacturing, and retail trade sectors were the sectors that lost the largest numbers of jobs. Together, these three sectors accounted for a net loss of 32,940 jobs. At the same time, lodging, restaurants, and bars; professional services; healthcare; and corporate and regional offices were the only sectors that gained jobs over this time period. These four sectors gained 10,308 jobs.

Over the last five years, however, more than half of the twenty-two major industry sectors are showing signs of strengthening and recovery. Lodging, restaurants, and bars; healthcare; and arts, entertainment, and recreation experienced the largest gains between 2013 and 2018. In addition, transportation and warehousing; finance and insurance; and corporate and regional offices showed positive gains.

Recently, however, New Orleans is showing signs of weakening as total employment declined slightly between 2016 and 2018. This can be ascribed to continued losses in the retail sector and in oil and gas, which reflect global headwinds in these two sectors.

Over the next five years, the New Orleans economy is expected to resume its growth. Healthcare; lodging, restaurants, and bars; and arts, entertainment, and recreation are expected to add the largest number of new jobs.

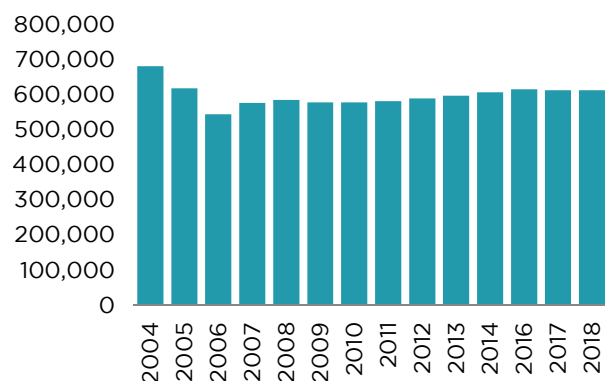


Figure A5. Total Employment, Greater New Orleans (2004 - 2018)

Source: EMSI 2019.1 – QCEW Employees, Non-QCEW Employees, and Self-Employed

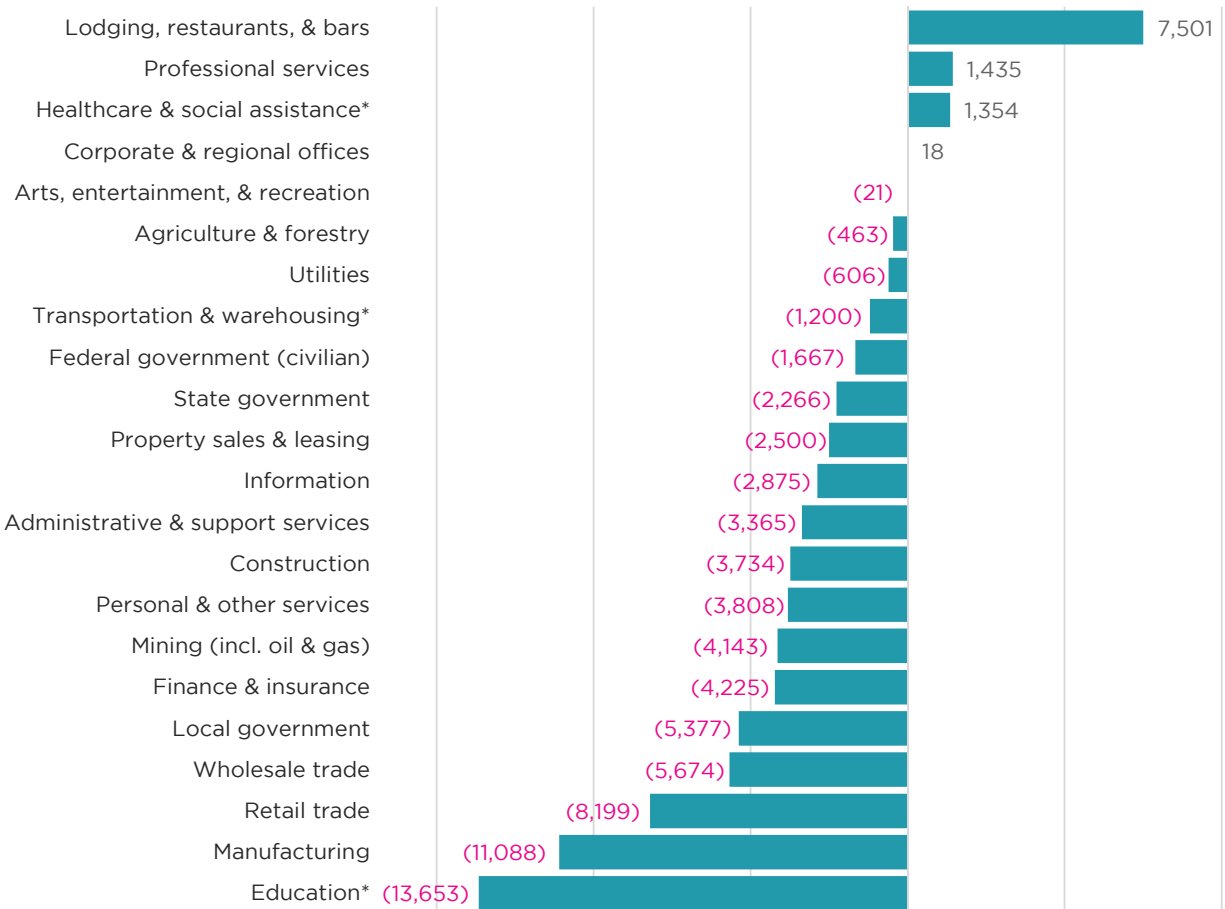


Figure A6. Net Change in Jobs Since Hurricane Katrina, Greater New Orleans (2004-2018)

Source: EMSI 2019.1 – QCEW Employees, Non-QCEW Employees, and Self-Employed

*Note: Includes related public-sector employment (e.g., education includes public schools, colleges, and universities; healthcare includes public hospitals; and transportation and warehousing includes US Postal Service workers).

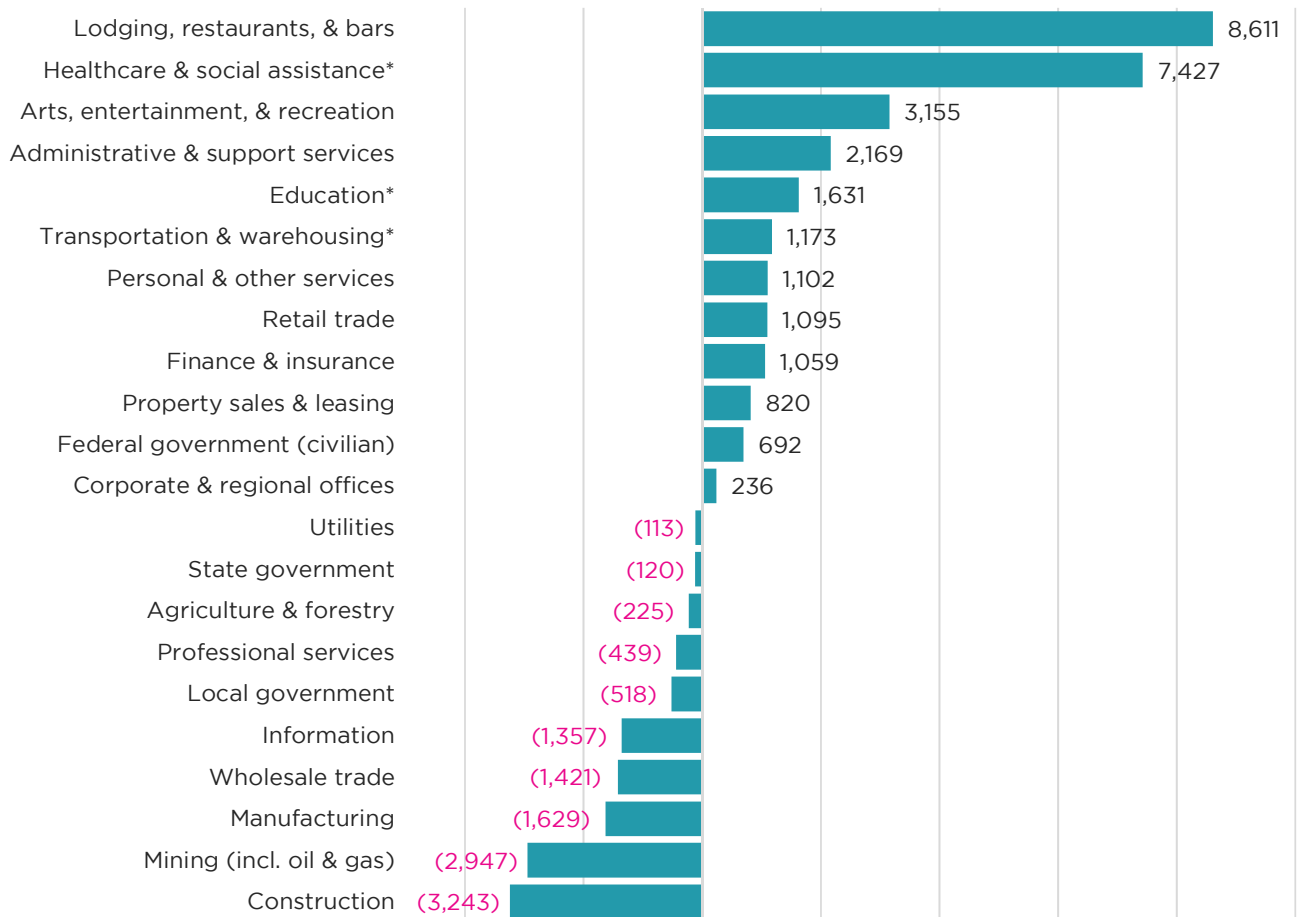


Figure A7. Net Change in Jobs, Greater New Orleans (2013-2018)

Source: EMSI 2019.1 – QCEW Employees, Non-QCEW Employees, and Self-Employed

*Note: Includes related public-sector employment (e.g., education includes public schools, colleges, and universities; healthcare includes public hospitals; and transportation and warehousing includes US Postal Service workers).

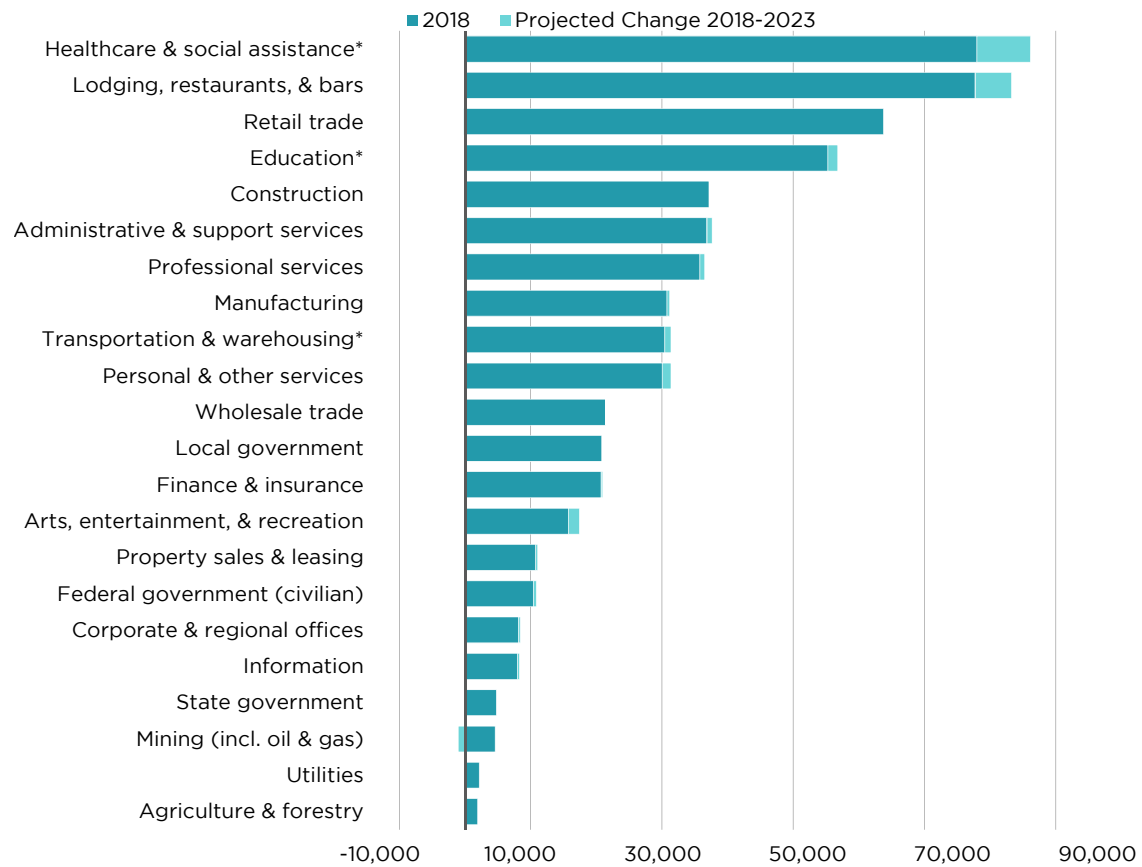


Figure A8. Total Employment by Industry, Greater New Orleans (2018 base + projected change)

Source: EMSI 2019.1 – QCEW Employees, Non-QCEW Employees, and Self-Employed

*Note: Includes related public-sector employment (e.g., education includes public schools, colleges, and universities; healthcare includes public hospitals; and transportation and warehousing includes US Postal Service workers).

Real Estate Market Trends

As mentioned earlier, the City of New Orleans has experienced a decline in population since the 1960s. The excess capacity resulting from this population loss means that there are abundant infill development and adaptive re-use opportunities. This dynamic coupled with the strength of the tourism sector has heavily influenced the real estate market in New Orleans.

RESIDENTIAL MARKET OVERVIEW

From 2014 to 2015, New Orleans home prices surged from \$151 per square foot to \$172 per square foot. The housing market continued to perform well throughout most of 2018. By the end of 2018, however, the New Orleans housing market had become neutral with unit sales and prices decreasing and inventory increasing. In February 2019, the New Orleans Metropolitan Association of Realtors reported a decline in the average price and sales volume and an increase in the number of days on market for single family homes compared to February 2018.

The multi-family market remains stable, with higher occupancy rates. The highest rents continue to be in the downtown market, which is also one of the most attractive areas for new construction. New Orleans East and Algiers are two of the most affordable sub-markets. However, with new inventory unlikely to come online in the areas and occupancy rates remaining strong, New Orleans East and Algiers are likely to see rents rise.

The New Orleans housing market is an attractive market for investors. For investors looking to flip a property, New Orleans offers a fairly high average gross return on investment and relatively low barriers to entry. For investors looking for income producing properties, the popularity of short-term rentals has made this a profitable venture. This has caused distortions in the market that have led to the City of New Orleans instituting additional regulations of short-term rentals, in particular.

COMMERCIAL OVERVIEW

The inventory of retail space, particularly in central New Orleans, is increasing as part of mixed-use projects and with the popularity of ground floor retail. At the same time, rental rates, especially for Class A space, have increased. This bright spot is somewhat overshadowed by the national retail market.

Nationally, the retail sector continues to face adverse trends. More and more retail chains are declaring bankruptcy and downsizing their retail footprint. From Toys R Us to Sears to Mattress Firm and Payless Shoes, more than 60 major chains have declared bankruptcy since 2015. Other retail chains, such as Lowe's, are closing underperforming stores, and others, such as Rite Aid, are closing stores as part of the sector's consolidation trend. In New Orleans, this trend has led to a glut of retail space in some areas, particularly in the areas outside of the central city.

However, a number of malls in New Orleans are undergoing substantial renovations and upgrades including the Esplanade Mall, Clearview Mall, Lakeside Mall, Canal Place, and Elmwood Center. In addition, the tourism-centric retail areas remain strong and growing.

The inventory of industrial and office space is declining in New Orleans as a result of the re-use of buildings for hospitality and multi-family projects. This diminishing supply has helped bolster occupancy and rental rates. Recent successes in business locations, such as DXC, GE, Accruent, and Lucid, have had positive effects on the regional office market, but more tenant demand is needed to sustain this trend. Investments in the Port of New Orleans and some retail growth should spur demand in industrial/warehouse space. Dry land and flood zone requirements have pushed some distribution and warehousing westward. Yet, New Orleans East showed strong levels of activity in 2018, with low vacancy and stable lease rates.

Development Trends and Major Projects

The majority of the major development projects in the New Orleans region are concentrated in the central city and are related to healthcare or tourism. Almost all of the projects are adaptive re-use or infill projects.

Of the projects highlighted in the map below, eight are new hotels that will add 2,800 rooms to the New Orleans hospitality market. In addition, these hotel projects and another six multi-family projects will add about 1,500 housing units that range from affordable to luxury units.

Healthcare-related projects include expansions of Ochsner Health System, University Medical Center, the New Orleans VA, and Children's Hospital.

Dixie Brewing and Starlight Studios are two industrial projects under construction in New Orleans East.

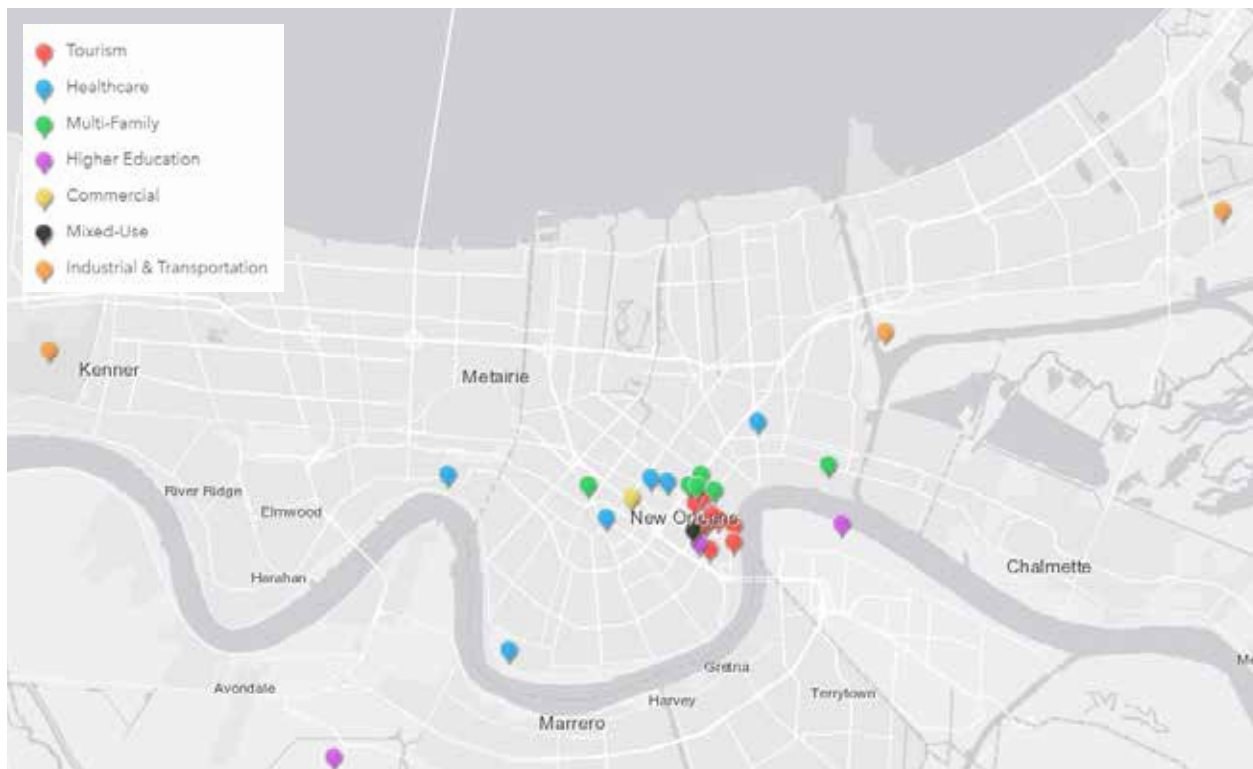


Figure A9. New Orleans 2019 Development Trends

Source: New Orleans & Northshore Region Real Estate Market Analysis. University of New Orleans, April 2019.

APPENDIX C - NEW ORLEANS EAST CONTEXT

New Orleans East is defined as the area east of the Industrial Canal and north of the Intracoastal Waterway. There are an estimated 75,965 people and 27,139 households in this area. The daytime population is estimated to be more than 64,000. The median age of the population is 34 years old and the median household income is \$33,429, and the median home value is \$168,272.

Between 2000 and 2010, the area's population declined from 96,119 to 64,182, or 33 percent. Since 2010, the population is estimated to have grown more than 18 percent. However, the population remains about 80 percent of its 2000 population.

More than 80 percent of the 33,516 housing units in the area are occupied. Of these occupied units, 52 percent are owner-occupied and 48 percent are renter-occupied.

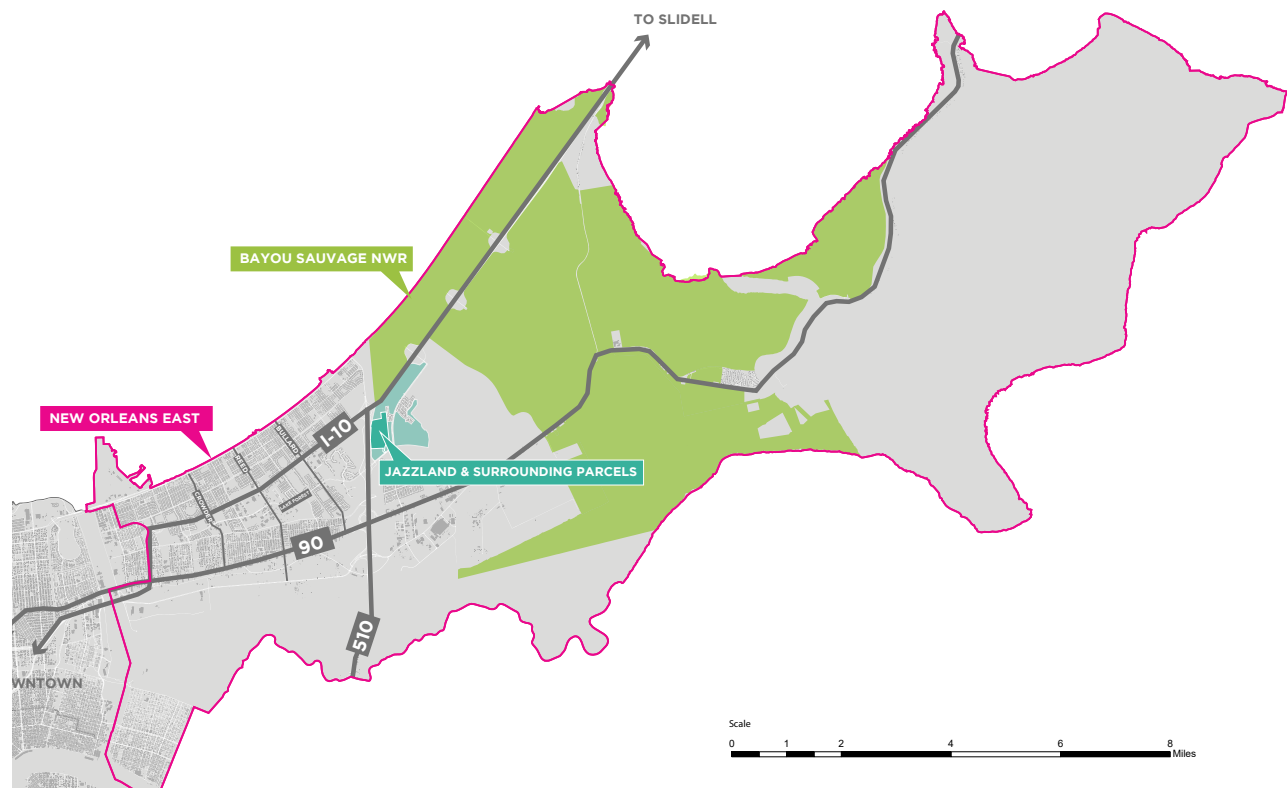


Figure A10. New Orleans East Building Footprints

Source: City of New Orleans, GIS

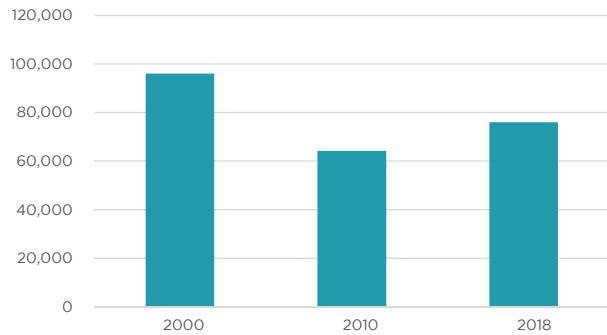


Figure A11. Population New Orleans East (2000 - 2018)
Source: ESRI

More than 6,000 housing units are vacant, which represents about 19 percent of the total number of housing units. Of the vacant units, 40 percent are for rent. Almost 3,000 units are vacant and not for rent, for sale, or for occasional/recreational use.

The latest employment data for New Orleans East (2015) shows that there are 11,800 jobs in the area and about 24,365 residents of New Orleans East who are employed. Of these employed residents, more than 90 percent commute outside of the area for work each day.

The largest employment sectors in New Orleans East are transportation and warehousing, retail trade, and manufacturing. Key employers include NASA's Michoud Assembly Plant, the US Coast Guard, and Folgers.

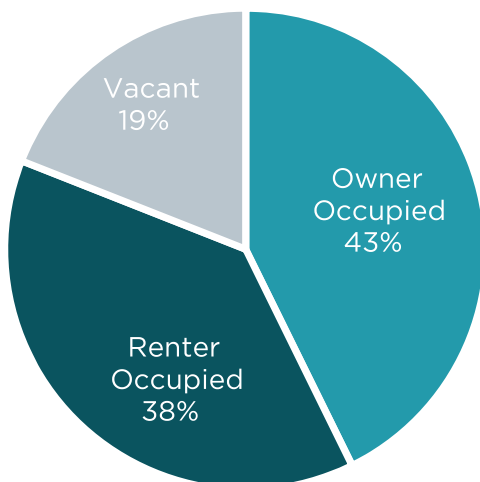


Figure A12. Housing Units by Occupancy, New Orleans East (2018)
Source: ESRI

Development Trends in New Orleans East

Since 2005, New Orleans East has received more than \$3.5 billion in public and private investment. Public investment included investments in storm protection, streetscape and road improvements, park renovations, and road reconstruction. In addition, many public facilities have been rebuilt or improved, such as the New Orleans East Hospital, the East New Orleans Regional Library, the Lakefront Airport, and a number of schools, fire stations, and police stations. Major private investments have included reconstruction or expansion of industrial facilities - Folgers, Blade Dynamics, New Orleans Cold Storage, and South Shore Harbor Marine. Highlights of investments in the retail sector include Super Walmart and New Orleans Hamburger & Seafood

Company as well as the anticipated openings of PJs Coffee and AT&T. The \$30 million investment of Franklin Avenue Baptist Church in a new facility in New Orleans East was also significant.

In spite of the investment in New Orleans East, Lake Forest Plaza and numerous vacant storefronts along the East's major commercial corridors are reminders that the area is still in need of further stabilization. The closure of Lowe's and Rite Aid are a reflection of external trends, but indicate that these stores were lower performing than other locations in these retailers' portfolios. In addition, almost 10 percent of the housing units in the area are vacant and unused. In other words, the housing and retail markets have not recovered since Hurricane Katrina and continue to face challenging conditions.

New Orleans East is undergoing a dramatic transformation, fueled by significant public and private investment that is positioning the area as an important corridor for sustainable development and growth. It offers a unique and dynamic mix of assets: attractive "lakefront" suburban residential communities, improved parks and recreational opportunities, high performing public and private schools, an enhanced system of community-wide flood protection, and an expanding center of business and technology.

Project Name and Investment

Public Private Public

- 1) Army Corp Storm Protection - \$2.5B
- 2) NASA Michoud Assembly Facility - \$305M
- 3) USCG Base Support Unit - \$90M
- 4) Folgers - \$70M
- 5) Lakefront Airport - \$55M
- 6) New Hospital - \$40M
- 7) TCI - \$14.5M
- 8) Blade Dynamics - \$13M
- 9) Wright Road Reconstruction - \$10M
- 10) 6600 Plaza Dr. Office Renovation - \$8.5M
- 11) South shore Harbor Marine - \$8.5M
- 12) Joe Brown Park and Center - \$7.8M
- 13) New "Technology" Library - \$7.5M
- 14) NOPD 7th District Station - \$6.5M
- 15) Michoud Front Deck Improvements - \$6.2M
- 16) Public Belt RR - \$6M
- 17) New Orleans Cold Storage - \$6M
- 18) Atlantic Metrocast - \$5M
- 19) Flightline First FBO - \$2M
- 20) Landmark Aviation FBO - \$7M
- 21) AeroPremier Jet Center FBO - \$7M
- 22) N.O. East Comm. Health Center - \$1.1M
- 23) Road Road Streetscape - \$1M
- 24) Lakeforest Blvd. Streetscape - \$1M
- 25) Crowder Blvd. Streetscape - \$1M
- 26) Alcee Fortier Streetscape - \$500K
- 27) NOFD Engine #10 Station - \$368K
- 28) NOFD Engine, # 31 Station - \$ 2.8M
- 29) Di Benedetto Playground - \$ 311K
- 30) Digby Park - \$112K
- 31) Franklin Avenue Baptist Church
- 32) Palace Truck Stop - \$1M
- 33) Swilling Center - \$7M



Figure A13. New Orleans East Public-Private Improvements

Source: NOLAEAST.com

In fact, many of the New Orleans East neighborhoods are relatively worse-off than they were in 2012. The Reinvestment Fund recently completed a Market Value Analysis for the New Orleans Redevelopment Authority. Market Value Analysis assigns categories to different neighborhoods based on their performance across 11 different market indicators. [Figure A14](#) shows the outcome of this analysis. Neighborhoods classified as A are considered stronger and neighborhoods classified as I are considered weaker. This analysis of New Orleans East relative to the overall market shows that conditions have not improved in many New Orleans East neighborhoods.

Yet, New Orleans East is one of the most affordable areas of the city, offering opportunities for first-time home buyers and bargain hunters. While home prices in central New Orleans increased almost 70 percent

over the last ten years, home prices in New Orleans East have increased by about 30 percent.

In addition, New Orleans East's industrial areas continue to attract new investment and new tenants, including Dixie Brewing, Starlight Studios, and LM Wind Power, and its more than 400,000 square feet of office space remains largely occupied. Furthermore, investment in the Port of New Orleans and New Orleans East's advantageous access to transportation infrastructure and markets creates further opportunity for industrial development. Finally, New Orleans East is adjacent to the nation's second largest Urban Wildlife Refuge - Bayou Sauvage and has access to abundant natural resources and recreational opportunities. These positive trends can and should be leveraged to create more momentum and drive more investment into the area.

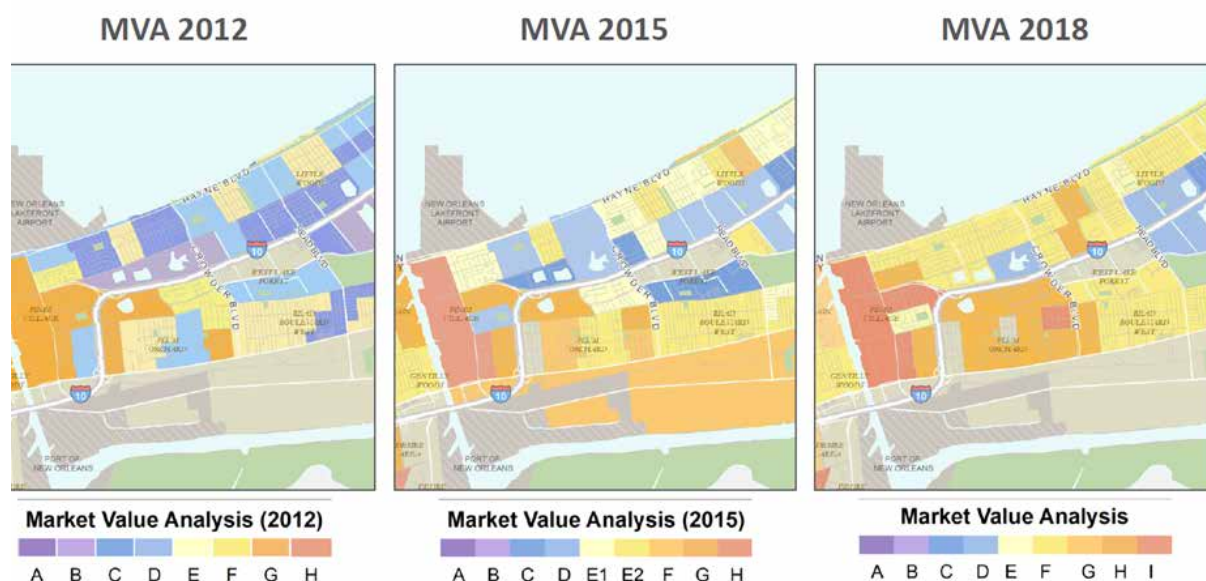


Figure A14. New Orleans Market Value Analysis, 2018

Source: New Orleans Redevelopment Authority

APPENDIX D - EXISTING CONDITIONS

NEW ORLEANS EAST

New Orleans East Commercial Corridors

Crowder, Read, and Bullard are the three major commercial corridors and exits off of I-10 into the heart of New Orleans East. Each corridor has its own character and land-use potential. During the community input sessions held for this project, stakeholders expressed a desire to see these corridors revitalized.

While this study primarily focuses on the Jazzland site and surrounding parcels, it is important to acknowledge the existing conditions and opportunities along the main commercial corridors so that any opportunity to redevelop Jazzland is coordinated with efforts to revitalize the corridors. This will ensure that any redevelopment on the Jazzland site complements and enhances, rather than compromises, the efforts to revitalize the corridors.

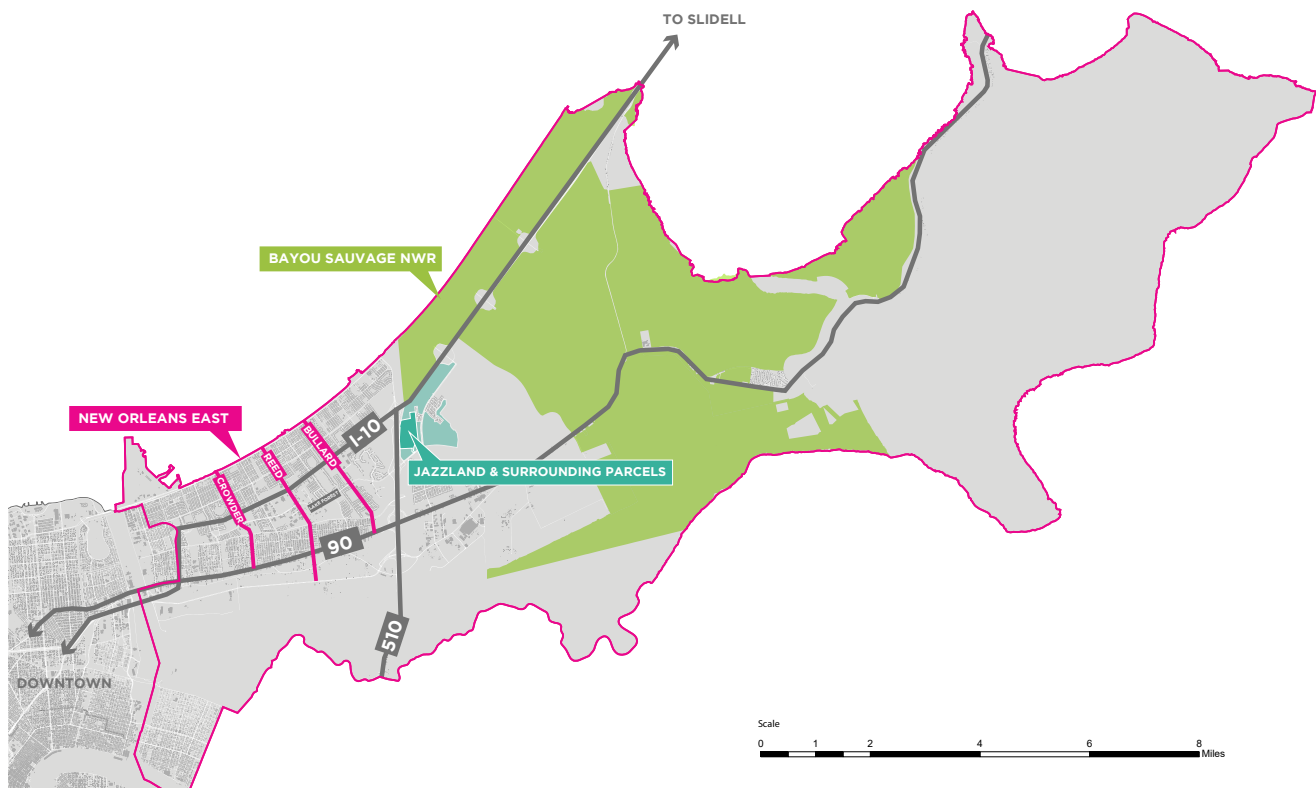


Figure A15. New Orleans East Corridors

Source: City of New Orleans, GIS

Crowder Boulevard

The majority of the land uses along Crowder are residential with commercial uses increasing towards I-10. Several of the storefronts along Crowder were visibly vacant, but new buildings like the Walgreen's on Crowder and Lake Forest show signs of recovery. The occupied retail space is a mix of national chains such as Planet Fitness and Metro PCS and locally-owned businesses such as Casa Honduras and Bernard's Pralines of New Orleans.

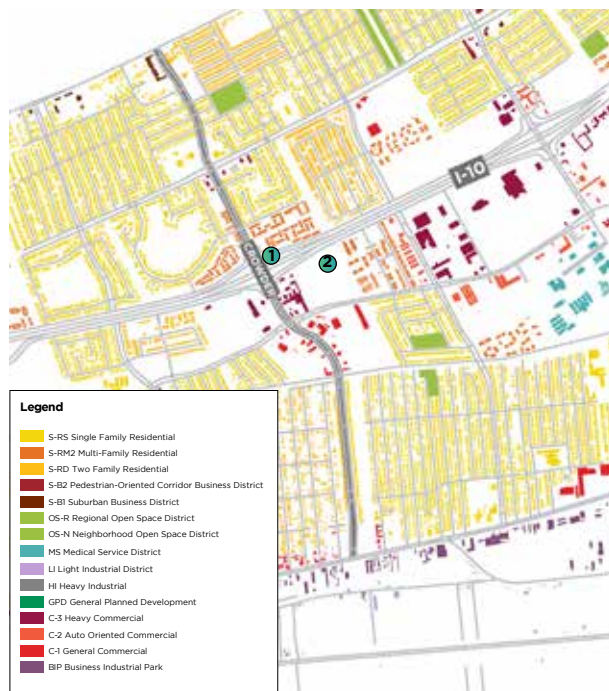


Figure A16. Crowder Zoning

Source: City of New Orleans, GIS



A new Walgreen's Pharmacy at the corner of Crowder and Lake Forest.



Figure A17. Crowder Boulevard Flood Conditions

Source: City of New Orleans, GIS



A vacant Beauty Connection on Crowder south of Lake Forest.

Read Boulevard

Read is a mixture of residential and commercial uses with large commercial abutting I-10 and a Hospital District south of Lake Forest. The intersection of Read Boulevard and Lake Forest is an important community node with assets like the New Orleans East Hospital, Joe W. Brown Park and the Audubon Louisiana Nature Center. It is also the site of the 80-acre Lake Forest Plaza, which was a regional shopping mall that has been largely demolished since Hurricane Katrina.

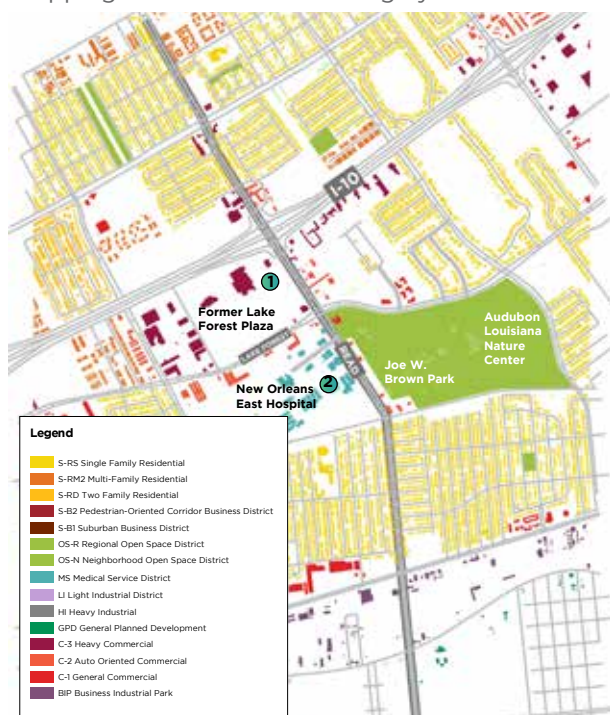


Figure A18. Read Boulevard Zoning

Source: City of New Orleans, GIS



The Lowe's on Read recently closed.

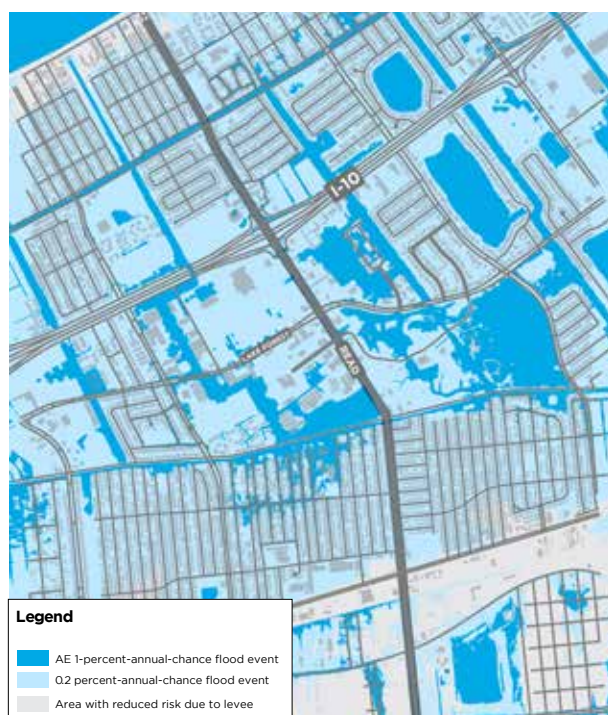


Figure A19. Read Boulevard Flood Conditions

Source: City of New Orleans, GIS



The Joe W. Brown Park and the Audubon Nature Center are community destinations for all of New Orleans.

Bullard Boulevard

Bullard is primarily residential south of Lake Forest, with commercial uses increasing in intensity north towards I-10. Strip retail and fast food line the east side of Bullard and a new Walmart Supercenter bustles with activity on the west side of Bullard just south of I-10. There are also a number of large vacant parcels for sale.

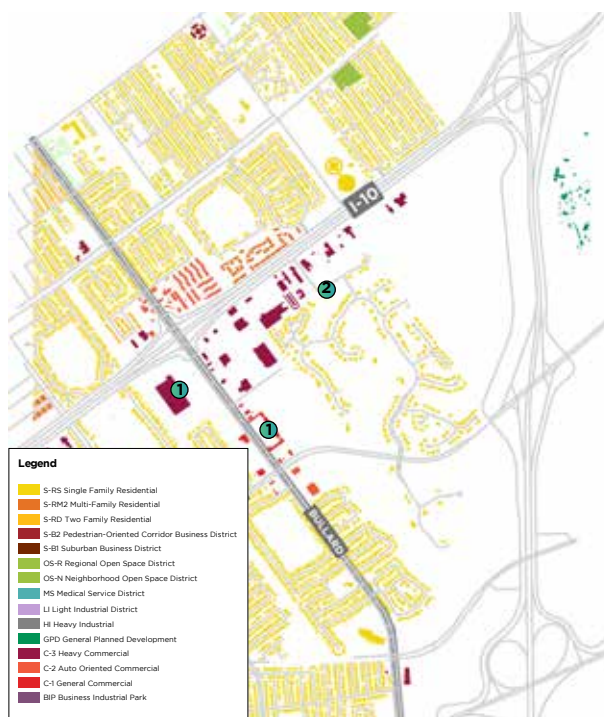


Figure A20. Bullard Boulevard Zoning

Source: City of New Orleans, GIS



The Walmart Supercenter parking lot is full on a Tuesday afternoon.



Figure A21. Bullard Boulevard Flood Conditions

Source: City of New Orleans, GIS



A large strip retail center parking lot is also full of cars on a Tuesday afternoon.

JAZZLAND

Transportation Access

The study area is located about 16 miles from Downtown New Orleans and is accessible by car via the 510 and I-10 interstates. It is possible to get to the study area by public transit using the 63/64/65 RTA bus lines. The

main Jazzland site takes access off of Lake Forest Boulevard and Michoud Boulevard. There is limited sidewalk and bicycle connectivity on Michoud and Lake Forest, making it difficult to walk or bike to the study area.



Figure A22. Transportation Access

Source: City of New Orleans, GIS

2,250 1,125 0 2,250 Feet

Historical Context

The study area was historically marshland. In the wake of Hurricane Betsy in 1965, the levee system was enlarged to include the Pontchartrain levee all the way to the Bonne Carré Spillway and along the principal drainage canals in New Orleans and Jefferson Parishes. This increased the developable area within the levee system making it possible to extend development east.

Following the expansion of the levee system, the area was slated for a large master-planned community. Three interchanges with I-10 were constructed to accommodate the development. However, the development never occurred and two of the three were never used. In 1990, the federal government established the Bayou Sauvage National Wildlife Refuge which is located entirely in the city of New Orleans.



Figure A23. Jazzland 1936

Source: Chef Mentour, U.S. Geological Survey



Figure A24. Jazzland 1969

1969, Chef Mentour, U.S. Geological Survey



Figure A25. Jazzland 1972

Source: Little Woods, U.S. Geological Survey



Figure A26. Jazzland 1998

Source: Little Woods, U.S. Geological Survey

JAZZLAND

Aerial Photography

Hurricane Katrina had devastating impacts on Jazzland. After the storm, the park was left standing in four to seven feet of water, and had extensive wind and flood damage. The Google Earth aerial photography below shows that the theme park sat under water for roughly four months. The park closed for Hurricane Katrina and never reopened.



August 16, 2005



August 30, 2005



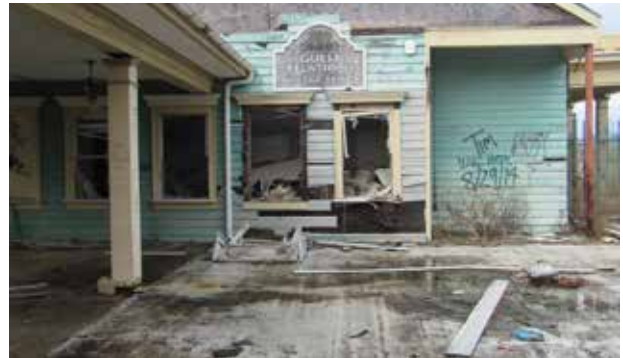
October 4, 2005



October 18, 2005

Site Photography

The project team toured the site and documented the existing conditions. The team observed that the structures were heavily vandalized and neglected, and that nature was reclaiming the site as a wetland.



JAZZLAND

Site Conditions

The main Jazzland site is 162.1 acres. According to a 2016 appraisal conducted for the Industrial Development Board, 145.9 acres are considered usable - net the lake and lagoon; 17 to 20 of these acres are undeveloped and would require clearing and fill for development. Much of the main site has been filled to street grade and is generally level. Those parts of the site not filled (and not the lagoon/lake) have returned to wetland state. According to the appraisal, the existing buildings are heavily vandalized, neglected, and

generally open to the elements. None of the elements of the improvements were deemed salvageable. The net cost of removing the elements to return the lot to “vacant” state was estimated to be \$1.3 million (that is net any value that could be extracted from scrapping metal or selling items with value). The site is served with gas/electricity by Entergy, and sewer/water by the City of New Orleans. The appraisal notes that utilities are typical & adequate for the market area. Phase I environmental assessment concluded no evidence of recognized environmental conditions in connection with the site.

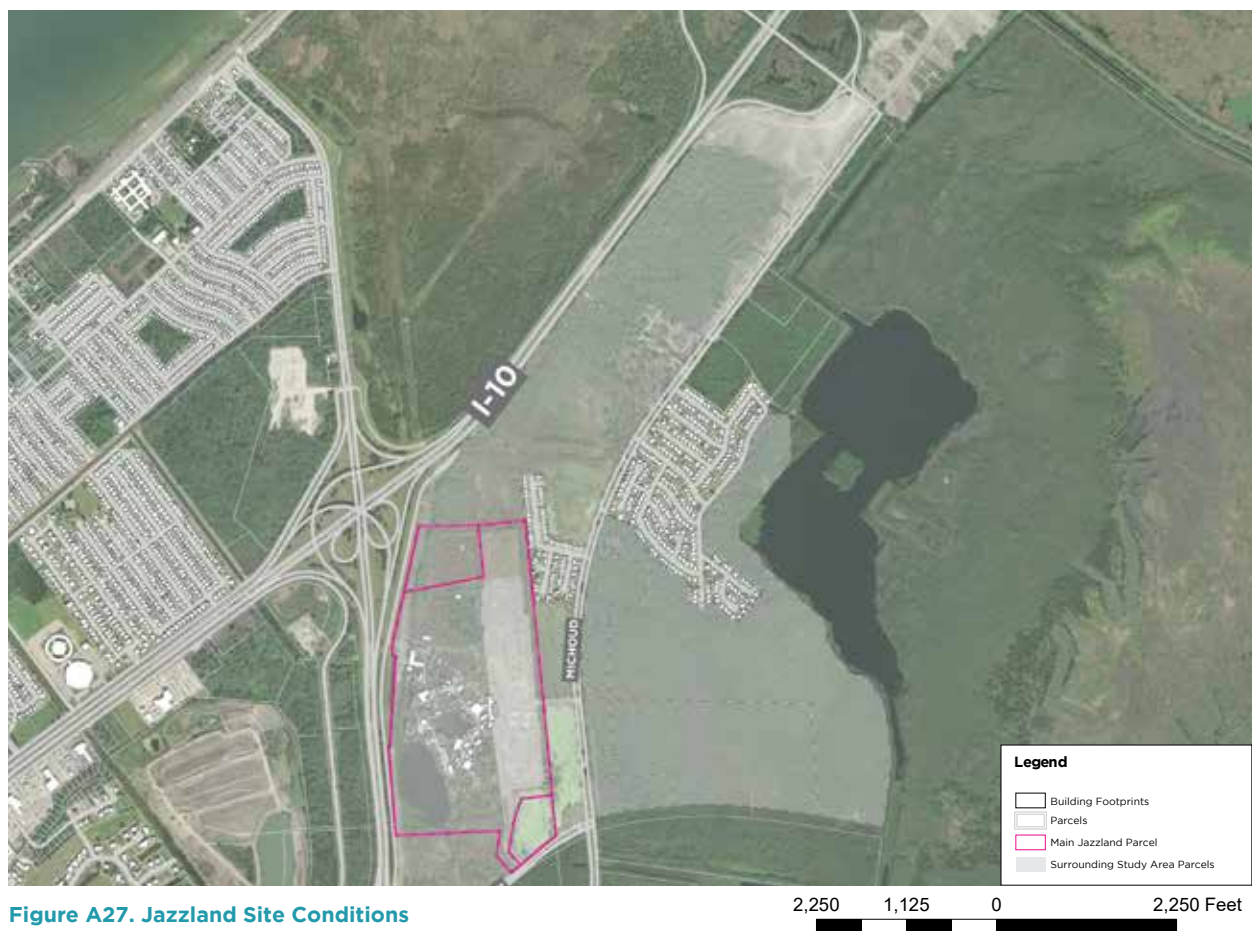
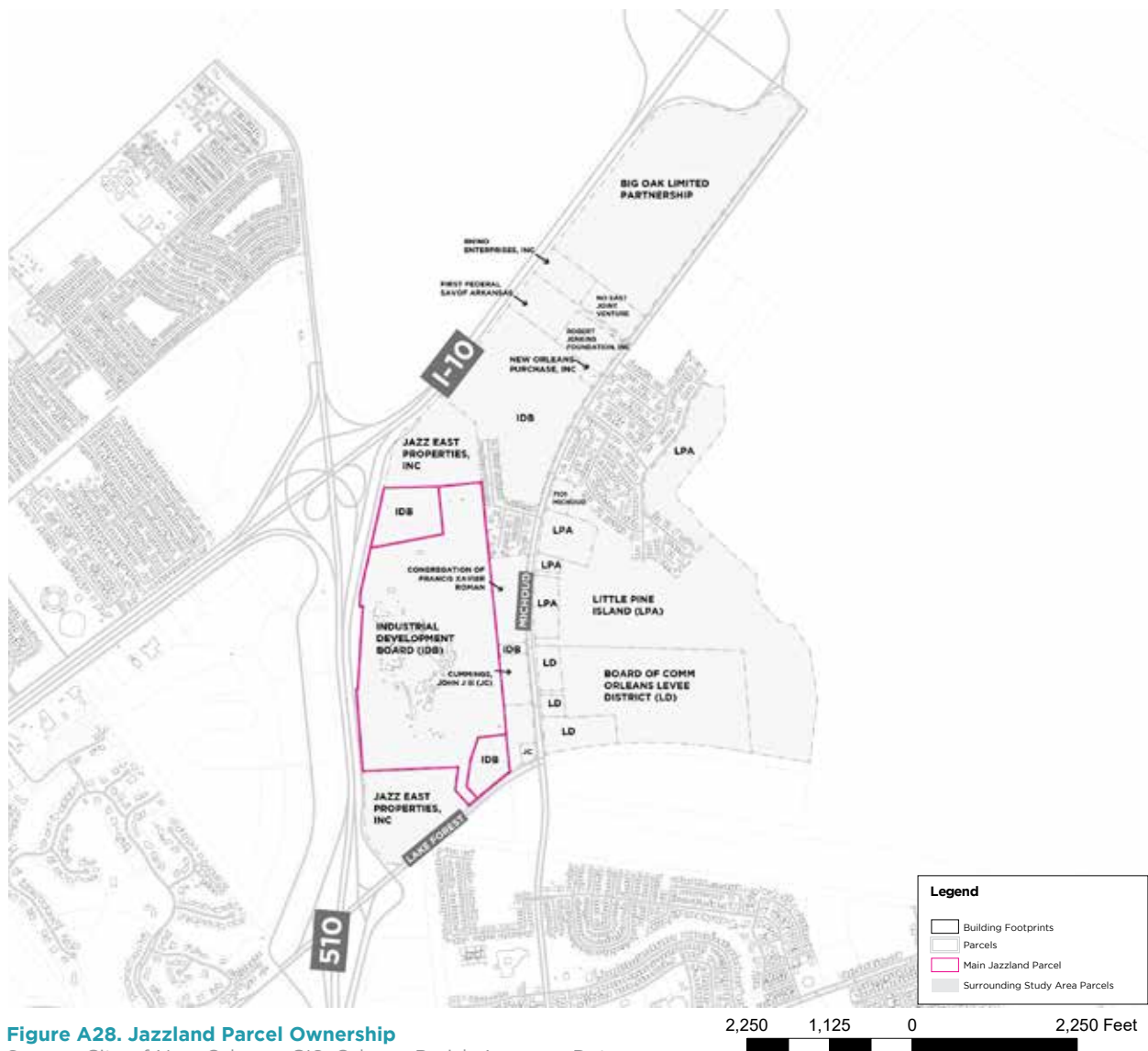


Figure A27. Jazzland Site Conditions
Source: City of New Orleans, GIS

Parcel Ownership

In addition to the main Jazzland site, the Industrial Development Board owns an undeveloped 65.4 acre property previously purchased by Six Flags for a future water park.

The other large land owners in the surrounding area are John Cummings (Little Pine Island, Big Oak Limited Partnership), The Board of Comm Orleans Levee District and Jazz East Properties, Inc.



Zoning

The majority of the study area is zoned General Planned Development (GPD), which is an environmentally sensitive zoning category created to encourage flexibility in the site design and development of land in order to promote its most environmentally

sensitive use and to preserve the natural and scenic qualities of wetlands and other natural land features. In addition to GPD, there are several commercially zoned properties primarily lining Michoud Boulevard and a few residential subdivisions.

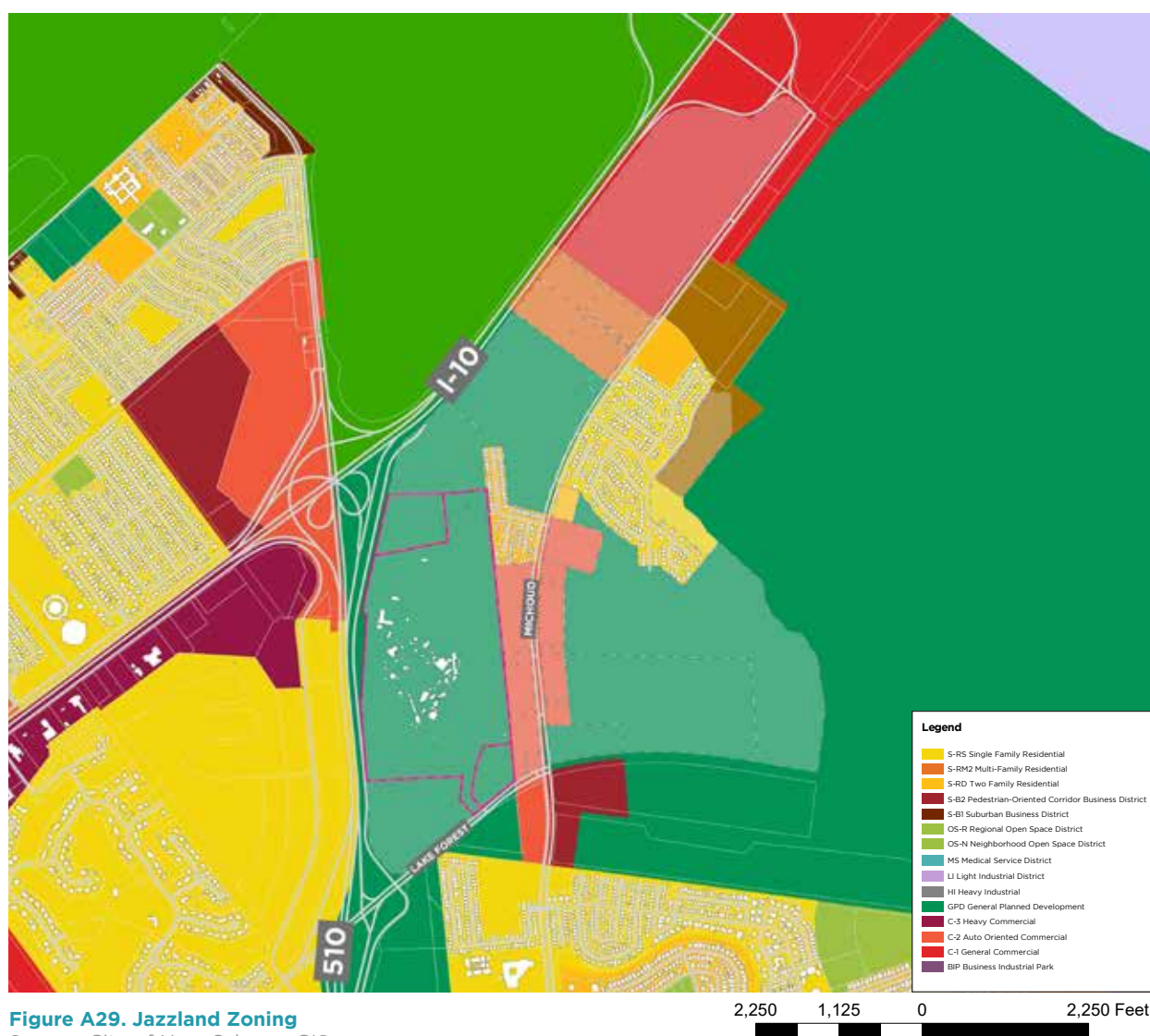


Figure A29. Jazzland Zoning

Source: City of New Orleans, GIS

Floodplain

All of the study area is in the 500-year-floodplain (.02 percent), with a considerable portion in the 100-year-floodplain (1 percent).

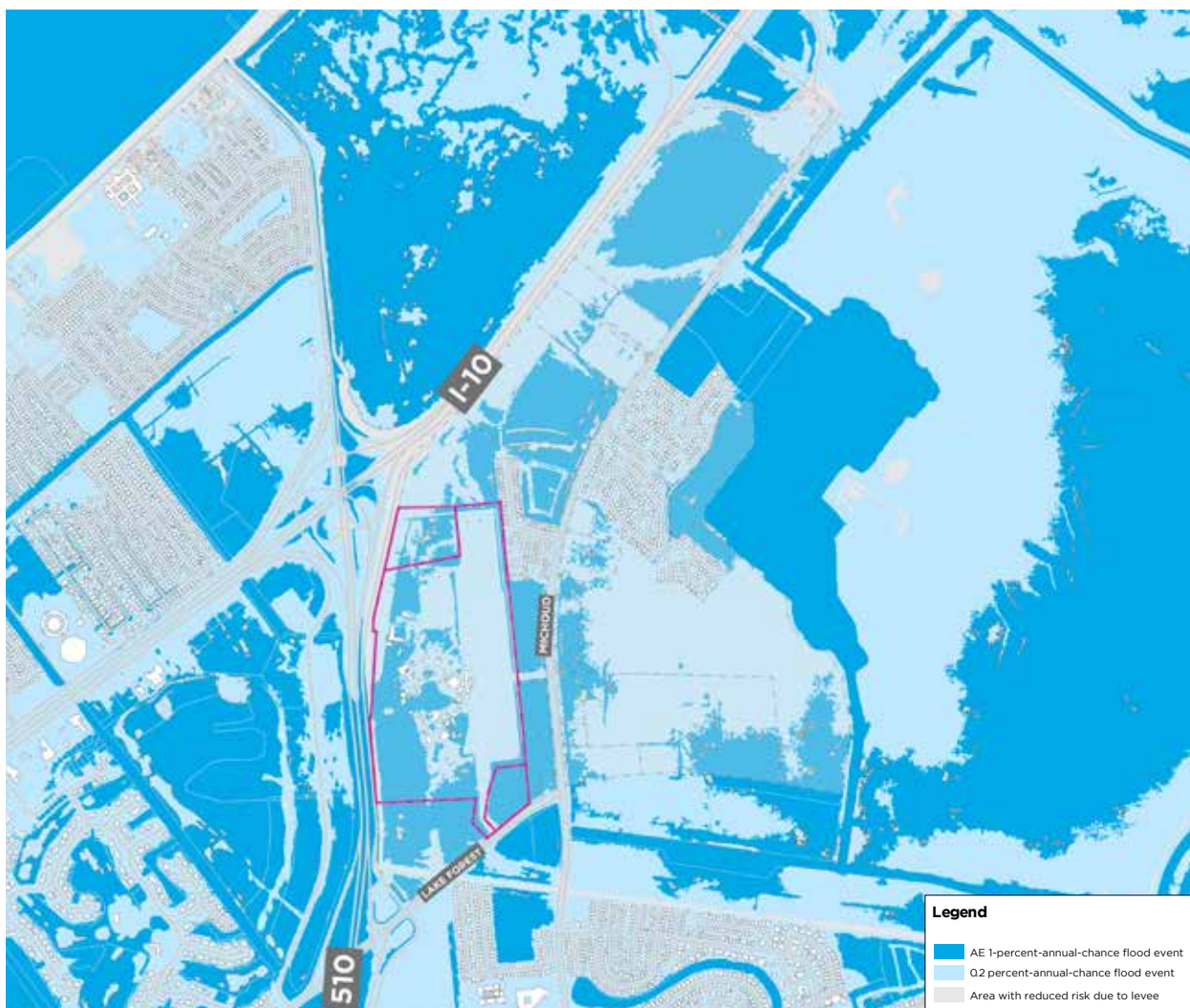


Figure A30. Jazzland Floodplain
Source: City of New Orleans, GIS

Wetlands

145.9 acres on the main Jazzland site underwent wetland mitigation and are considered usable - net lake & lagoon. The 2016 appraisal notes that wetland mitigation costs are an impediment to development and

fill material is required to bring land levels to grade and above to satisfy mitigation requirements.

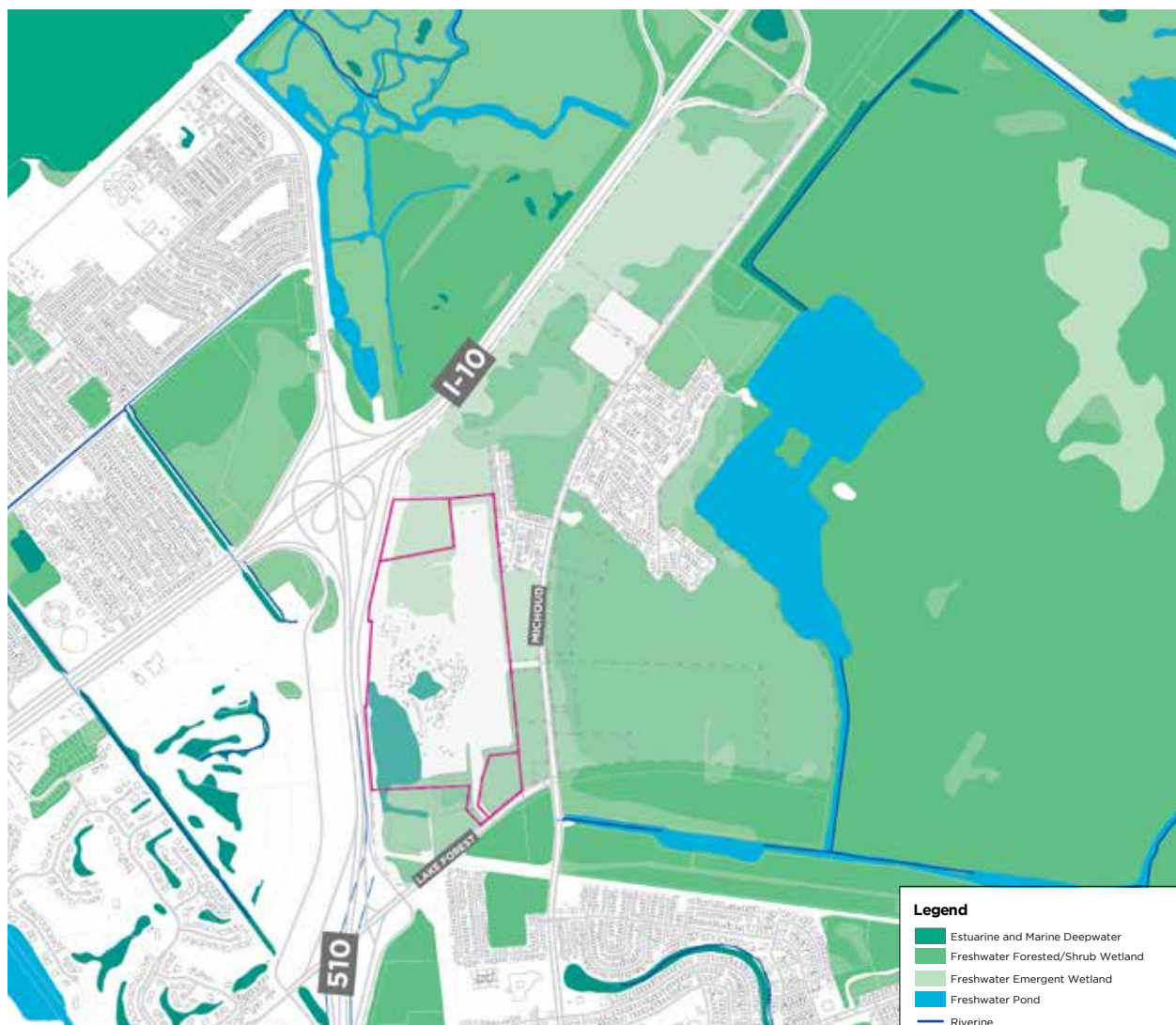


Figure A31. Wetlands

Source: City of New Orleans, GIS

Coastal Restoration

Louisiana's coast is changing. The Coastal Protection and Restoration Authority of Louisiana projects that 19 percent of New Orleans East will experience land loss over the next 10-years. Bayou Sauvage and the surrounding parcels around Jazzland will be some of the hardest hit areas in all of New Orleans.

The Low Scenario, 10-year estimate shows a projected land loss of 75 percent in the study area, and the Jazzland site itself has a projected land loss of 62 percent.



Figure A32. New Orleans East Low Scenario 10-year Land Loss Estimate, 2017 - 2027

Source: Coastal Protection and Restoration Authority of Louisiana

Opportunity Zones

All of Jazzland and the surrounding parcels lie within an Opportunity Zone. The Opportunity Zone program is a new federal incentive program created by the Tax Cuts and Jobs Act. The program was created to revitalize economically distressed

communities using private investments rather than taxpayer dollars. To stimulate private participation in the Opportunity Zone program, taxpayers who invest in Qualified Opportunity Zones are eligible to benefit from capital gains tax incentives available exclusively through the program.

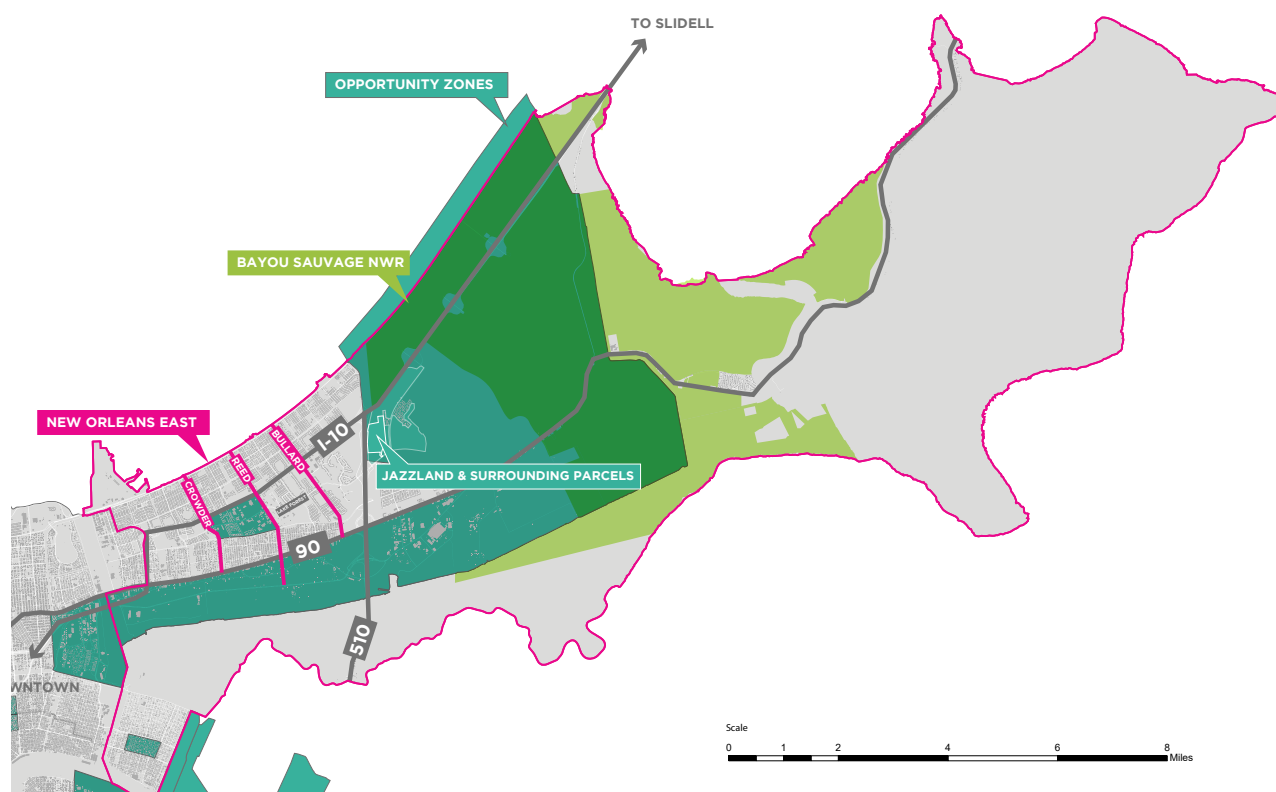


Figure A33. New Orleans East Opportunity Zones

Source: City of New Orleans, U.S. Department of the Treasury, GIS

BAYOU SAUVAGE NATIONAL URBAN WILDLIFE REFUGE

Located just north of the study area, the Bayou Sauvage National Urban Wildlife Refuge is a wetland habitat, rich in wildlife and recreation opportunities. Established in 1990, most of the refuge is located inside hurricane protection levees built to protect New Orleans from storm surge and flooding. Bayou Sauvage includes both fresh and brackish (a combination of fresh and saltwater) marshes and coastal hardwood forests.

The entire refuge is within the city limits of New Orleans, approximately 25,000 acres, making it the nation's second largest urban national wildlife refuge (after the Don Edwards San Francisco Bay National Wildlife Refuge). Bayou Sauvage has three access points, including a boat launch. At one of the access points, there is a 1,000 square foot picnic area. The other two access points have smaller shaded pavilions and picnic areas. There are 7 miles of trails that lead to bottomland hardwoods, freshwater and brackish marshes, lagoons, canals, borrow pits, and natural bayous. 340 different bird species can be seen throughout the year. The refuge receives approximately 150,000 visitors annually.

The refuge was substantially impacted by Hurricane Katrina with water covering depths of 6-8 feet and killing 90 percent of trees in the bottomland hardwood forest and over 1,700 acres of fresh and brackish marshes.

Bayou Sauvage is part of the US Fish and Wildlife Service's Urban Wildlife Conservation Program and part of the National Wildlife Refuge Association's Urban Refuge Program. The National Wildlife Refuge Association is a non-profit exclusively focused on protecting and promoting the 850 million-acre National Wildlife Refuge System, the world's largest network of lands and waters set aside for wildlife conservation.

The Urban Refuge Program strives to reach beyond refuge boundaries and into local communities throughout our nation to connect all Americans to nature and our wildlife heritage in a thoughtful and authentic way. Of the more than 560 refuges that make up the system, U.S. Fish and Wildlife Service (USFWS) has identified 101 national wildlife refuges as urban. Of those, 14 are designated regional urban refuges, two per region (except Alaska). Bayou Sauvage falls in Region 4.

Over the last century, Bayou Sauvage has been severely impacted by land loss. Between 1932 and 2009, impoundment, flooding, and dredging led to the loss of approximately 3,525 acres or 35 percent of land in Bayou Sauvage.



1932



1956



1977



1995



2009

The property, bordered by Chef Menteur Pass and Bayou de Lesaird, also is strategic to efforts to protect neighborhoods in New Orleans and other parishes along Lake Pontchartrain from hurricane surges.

APPENDIX E - STRATEGIC OPPORTUNITY ANALYSIS

Strategic Opportunity Analysis

The TIP - Perkins + Will team conducted a series of listening sessions to gather input from key groups of stakeholders in February 2019. These sessions engaged more than 30 stakeholders in a discussion of potential outcomes from the redevelopment of Jazzland. Through these discussions a clear set of guiding principles emerged for the opportunity analysis. These principles are summarized below:

1. The redevelopment requires a big, visionary plan.
2. It should create something for the community to rally around.
3. It must celebrate the people, place, and culture of New Orleans East.
4. It could become an economic catalyst to revitalize the area and reshape community image.
5. It must have intentional ties to New Orleans East to maximize the impact.

These sessions also helped to generate a preliminary list of uses and projects to analyze and evaluate as part of the opportunity analysis. The list included: entertainment, sports/recreation, residential, mixed-use community, hotels, restaurant, museum, innovation/research/higher-ed, hi-tech, industrial/distribution.

The TIP - Perkins + Will team then conducted a set of interactive workshops focused on three opportunities with the highest strategic and economic potential. The opportunities were selected based on the qualitative input received in the first series of stakeholder meetings and refined by considering the market dynamics of the New Orleans Metro and New Orleans East, the competitive environment, and the suitability and location of the Jazzland site.

The three opportunities evaluated were:

- **Transportation & distribution** - a distribution center, flex space, or multi-modal facility that would take advantage of the site's advantageous transportation access, market access, and location near the Port of New Orleans and the expansions/investments taking place there.
- **Higher education** - a combination of classrooms, accelerator/incubator space, and programming that would link the center to businesses in the area, innovation, and business spin-off opportunities.
- **Tourism** - a destination that would draw visitors and capture tourism revenue in New Orleans East, provide amenities for the residents in the nearby neighborhoods, and capitalizes on the site's location near Bayou Sauvage.



TOURISM

Job creation potential:* **200 - 300**

Average earnings per job:** **\$38,377**

Jobs multiplier:** **1.9**

Source: Emsi.

* Based on EIA, Commercial Building Energy Consumption Survey.

** Earnings and multiplier for Hotels and Motels.

Tourism

Tourism supports significant portions of three industry sectors - lodging, restaurants, and bars; retail; and arts, entertainment, and recreation. These three sectors employ more than 150,000 workers, which is about one-quarter of the region's employment base.

Tourism has emerged as the highest growth sector in the regional economy. In fact, the lodging, restaurants, and bars sector has gained 7,500 jobs over its pre-Katrina level and was, by far, the highest growth sector between 2004 and 2018.

According to a recent study by DKSA, in 2017 the tourism sector attracted 17.74 million visitors, who spent \$8.79 billion. Although both the number of visitors and visitor spending has grown steadily over the past five years, per visitor spending has grown less than 1 percent each year, with the exception of 2014.

An important and growing segment of visitors is cruise ship passengers, which began with the opening of a cruise terminal at the Port of New Orleans in 2006. In 2018, there were 1.2 million cruise passengers and

235 passenger ships. It is estimated that the cruise ship passengers spent \$129.1 million in the local economy. According to a recent report done by LSU and JLL, 90 percent of cruise passengers are from out of state and 73 percent spend multiple days in Louisiana. As a result, cruise passengers generate more than 306,000 room nights in area hotels annually.

In 2010, the New Orleans Strategic Hospitality Task Force completed a report that identified strategies to reinvigorate and strengthen the tourism economy in New Orleans. The report set out an ambitious plan of reaching 13.7 million visitors by 2018 - the city's 300th anniversary. This was about 6 million more visitors than in 2008 and would put New Orleans in the Top 10 US Leisure and Convention Destinations by 2020. A key component of the plan was to attract more younger visitors and reinforce the brand of the city as "authentic" and "fun." Achieving this goal required a coordinated effort focused around priorities that included establishing clear governance and funding for the industry; revitalizing core assets; strengthening external positioning;

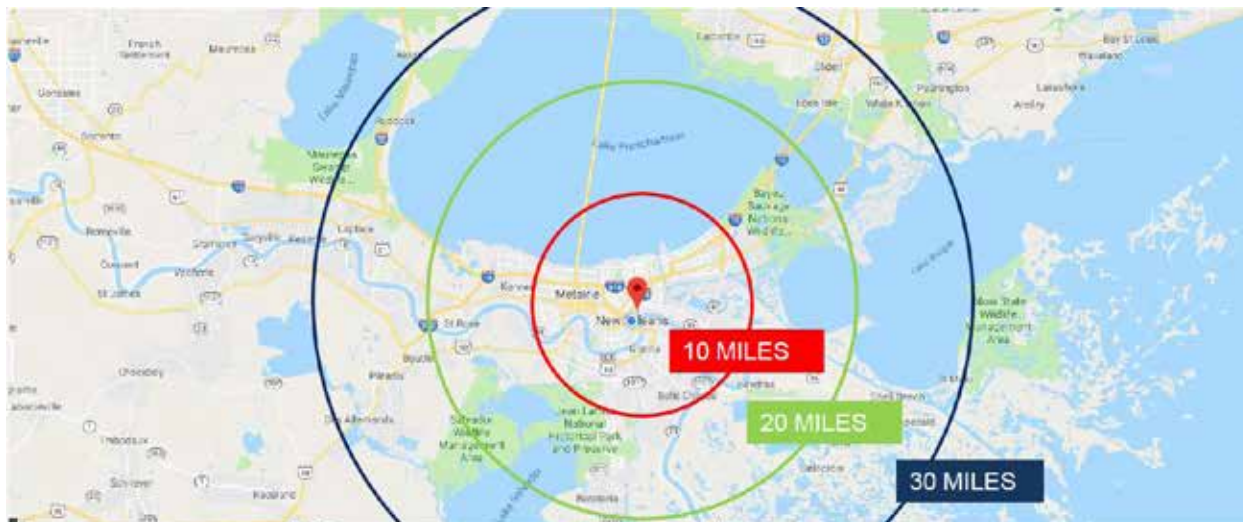


Figure A34. Distances to Natural Regional Amenities

Source: Google Maps

developing and supporting a world-class workforce; and driving long-term transformation. Implicit in driving long-term transformation is diversifying New Orleans' tourism products. Notably, New Orleans surpassed this goal of 13.7 million visitors by 2012, according to visitation estimates by DKSA.

Ecotourism and adventure tourism are two of the fastest growing segments of the global tourism market. According to Dynasty Travel, ecotourism is growing at a rate of 5 percent per year and is particularly popular among millennials. Adventure tourism has also grown exponentially in recent years. Research shows that tourists in the adventure tourism segment are often willing to pay a premium for exciting and authentic experiences.

Both of these tourism segments promote sustainable practices, which dovetails with New Orleans' resiliency plan.

In addition, New Orleans is positioned to be a launch pad for access to the region's natural amenities that are close by - the lakes, river, and canals as well as Bayou Sauvage, the Jean Lafitte National Historical Park and Preserve, and numerous wildlife management areas. The Lake Borgne Surge Barrier is another emerging destination. The Jazzland site with its proximity to Bayou Sauvage would be a great staging area for accessing this network of natural treasures.



EDUCATION

Job creation potential:* **50-60**

Could serve up to 2,000 students

Average earnings per job:** **\$75,962**

Jobs multiplier:** **1.6**

Source: Emsi.

* Based on EIA, Commercial Building Energy Consumption Survey.

** Earnings and multiplier for College, Universities, and Professional Schools (State Government).

Higher Education

The higher education sector, including both public and private institutions, employs 18,842 people, which is about 3 percent of the region's employment base. The sector includes 10 primary institutions that enroll more than 45,000 students. The sector suffered considerable job losses immediately after Hurricane Katrina, but recovered quickly and has remained stable.

One strength of this sector is its ability to attract talent, both students and faculty, from outside of New Orleans. Another strength of the sector is the ability to bring in research dollars and spur economic activity. New Orleans has developing research and innovation hubs around health and water.

Delgado Community College has a location in New Orleans East that is located on Old Gentilly Road. It offers courses on firefighting, industrial safety, and navigational radar. It also offers workforce training programs that support the maritime, oil and gas, and homeland security sectors. The center of New Orleans East lies about five to eight miles from the main campuses of most of the universities and colleges in the city.

A higher education campus in New Orleans East that focuses on research and innovation could spur business activity through entrepreneurship linkages. There are a number of sources of innovation in New Orleans East, including NASA, Folgers, Starlight Studios, and potentially re-manufacturing in connection to the recycling and scrap yards present in the industrial area.

In addition, the development of the water innovation hub, in particular, could be an opportunity for New Orleans East. The Water Institute of the Gulf recently announced it will be making a new home at the University of New Orleans Research and Technology Park, which lies about 10 miles to the west of the Jazzland site. The heightened presence of this anchor could be leveraged in the redevelopment of Jazzland as part of the regional effort to facilitate growth around the Water Economy.

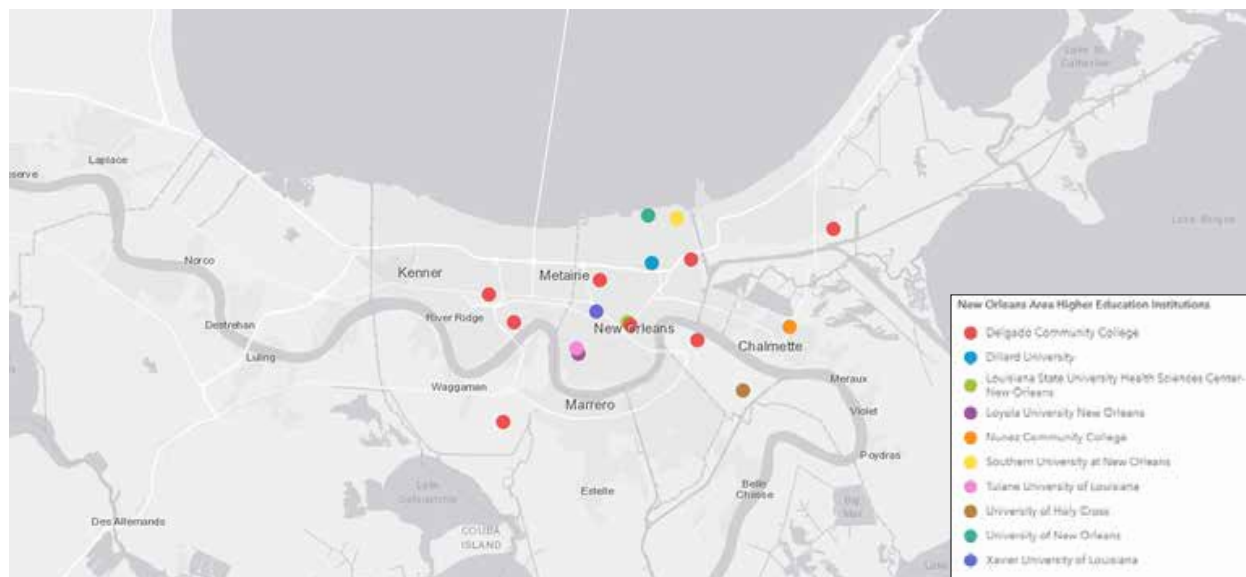


Figure A35. New Orleans Area Higher Education Institutions

Source: ESRI



The Water Institute of the Gulf has collaborated with Tulane University, Greater New Orleans Foundation, GNO Inc, UNO and other partners on a variety of projects around the city.



TRANSPORTATION & DISTRIBUTION

Job creation potential:* **300 – 700**

Average earnings per job:** **\$64,014**

Jobs multiplier:** **2.0**

Source: Emsi.

* Based on EIA, Commercial Building Energy Consumption Survey.

** Earnings and multiplier for General Warehousing & Storage

Transportation & Distribution

The transportation and warehousing sector employed 30,469 people in 2018, which is about 5 percent of the metro area's job base. Although the sector has not fully recovered to its pre-Katrina level, it has demonstrated strong growth over the past 5 years and is expected to continue to grow. Even with the job losses sustained since 2005, the transportation and warehousing sector remains one of the region's strengths with a higher concentration of employment in comparison to the US.

The Port of New Orleans recently developed a new master plan, which called for \$2 billion in investment including a new container cargo terminal and logistics center. In addition, the US Army Corp of Engineers is undertaking a project to deepen the ship channel to 50 feet. The Port is also looking to expand its intermodal volume by working with New Orleans Public Belt Railroad.

As the Port continues to see significant increases in imports, Ports America, the terminal operator, announced plans to invest in its current terminal and develop a separate terminal that would double the Port's capacity. With these investments and on-going marketing efforts, the Port should

continue to see additional growth in cargo, which will generate demand for additional distribution and warehouse space.

The Jazzland Site's position on an interstate exchange, near Class I railroads, and close to the Port and navigable waterways make it a good location for a facility in the transportation and distribution sector. Within 600 miles of the site, or about a day's drive, is a population of 87 million people and 33 million households.

However, there is a sizable inventory of sites in the Greater New Orleans region that share similar attributes and are more than 100 acres. In addition, the Jazzland site would require a zoning change, and the site's location in a flood zone could limit the universe of tenants willing to locate there. Furthermore, there are available sites in the existing industrial areas of New Orleans East, which community stakeholders felt were better suited for this type of project than the Jazzland site.

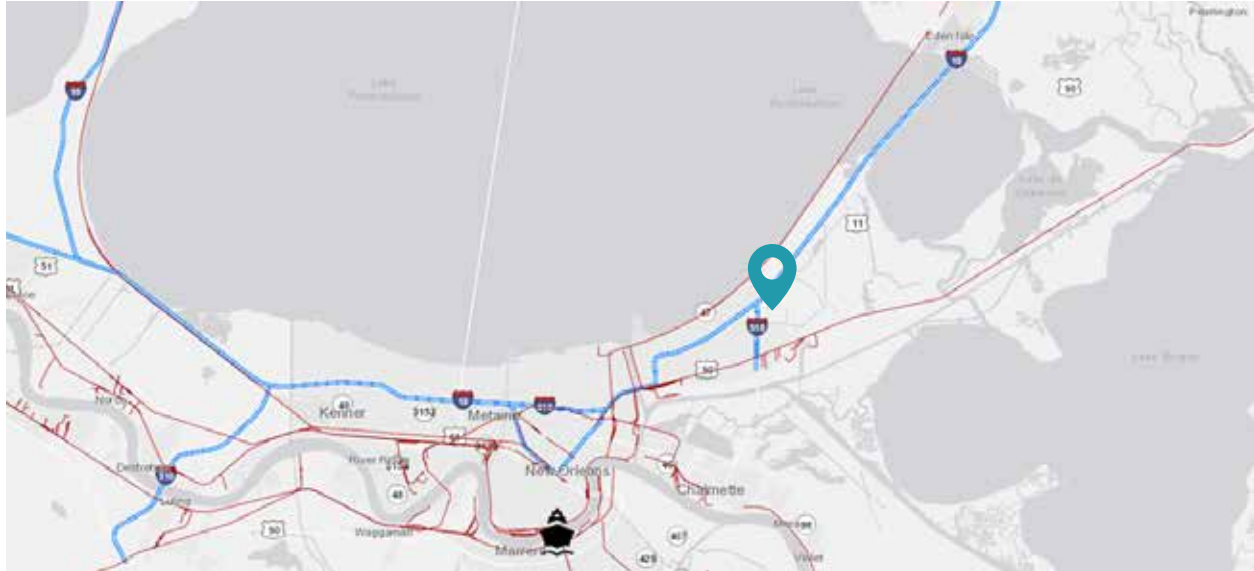


Figure A36. Transportation Access
Source: ESRI

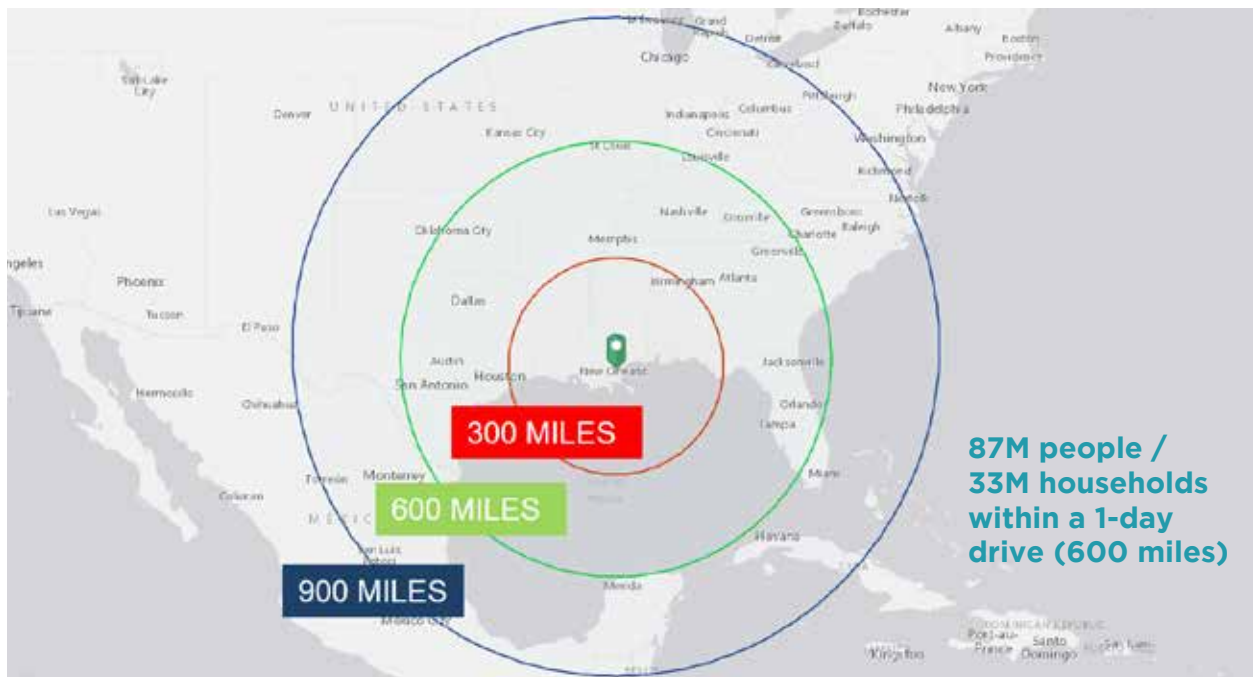


Figure A37. Market Access
Source: ESRI

APPENDIX F - WORK SESSION SUMMARY

Community Session

The first interactive session engaged 13 stakeholders in a conversation of the potential opportunities, then each participant rated the opportunities against the community goals that were articulated at the previous workshop.

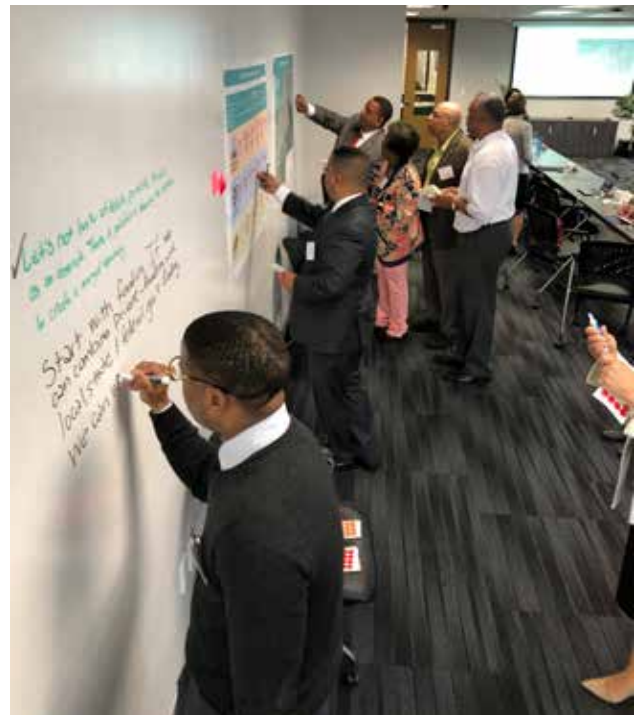
The goals were:

- **Job creation** - provides new economic opportunities
- **Catalytic potential** - has the ability to spur additional investment and market activity
- **Reflects the community / Community connections** - provides opportunities for community members to participate, as business owners, as employees, as neighbors
- **Family-oriented** - is an amenity for families to use or benefit from
- **Community returns on investment** - realizes tangible and measurable benefits for the neighborhoods

Participants were then asked to indicate the preferred location for the opportunity, providing them with an opportunity to locate the opportunity in another area of New Orleans East besides the Jazzland site.



Participants engaging in the community session.



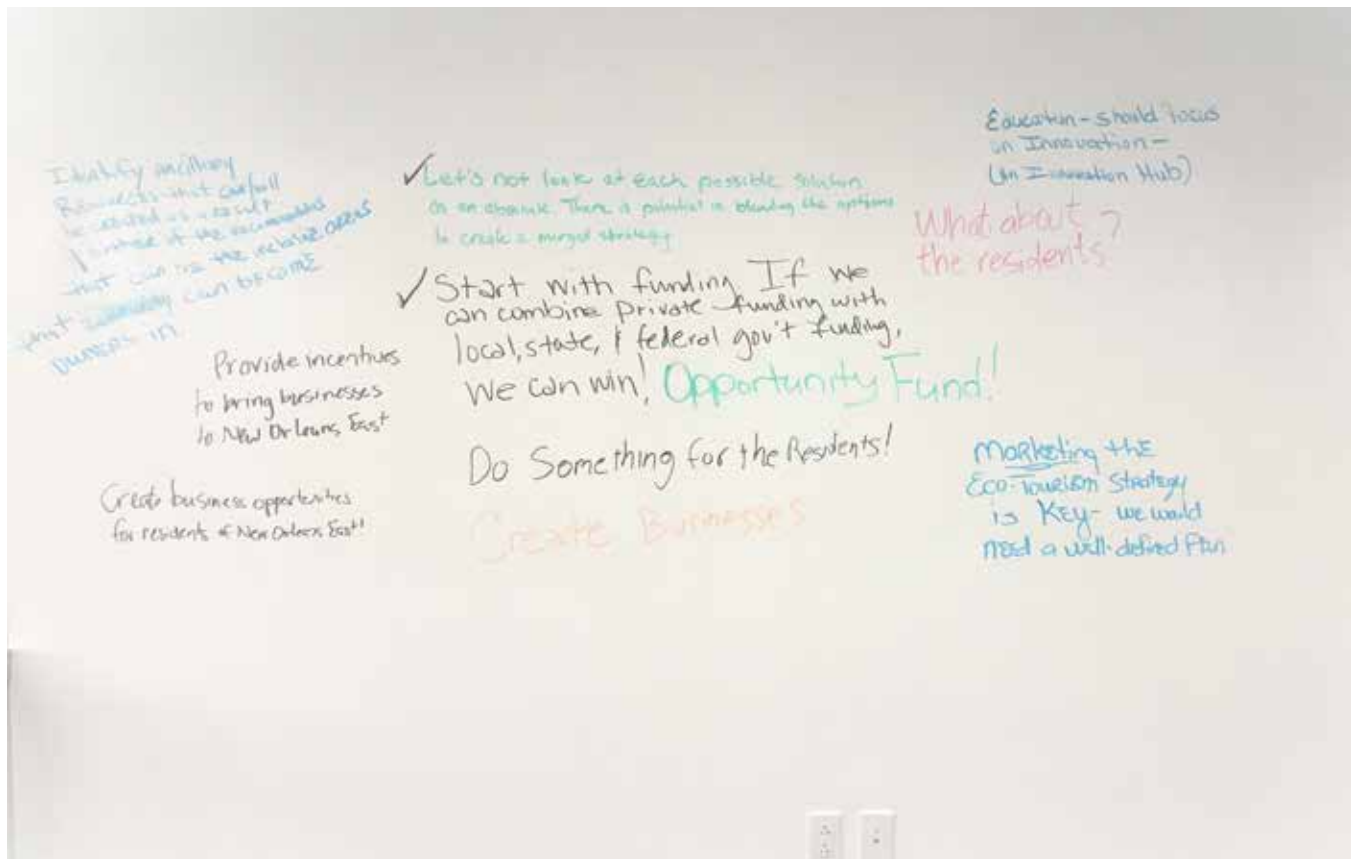
In addition to exercise, participants wrote their own thoughts on the wall.



Participants placed red dots along the scale bars to indicate how well the suggested opportunity achieved the community goals.



Participants used orange, blue and green dots to locate the identified opportunities on a map of New Orleans East. Many participants located tourism (green) and education (blue) on Jazzland and surrounding parcels.



In addition to exercise, participants wrote their own thoughts on the wall.

Technical Experts Session

The second interactive session invited technical experts in economic development and tourism to provide more detailed input. The team presented case studies of potential elements for the opportunity that emerged as the best strategic use.

With input from this set of stakeholders, the team was able to further refine the opportunity.



A focused work session with economic development and tourism experts identified potential programming elements.

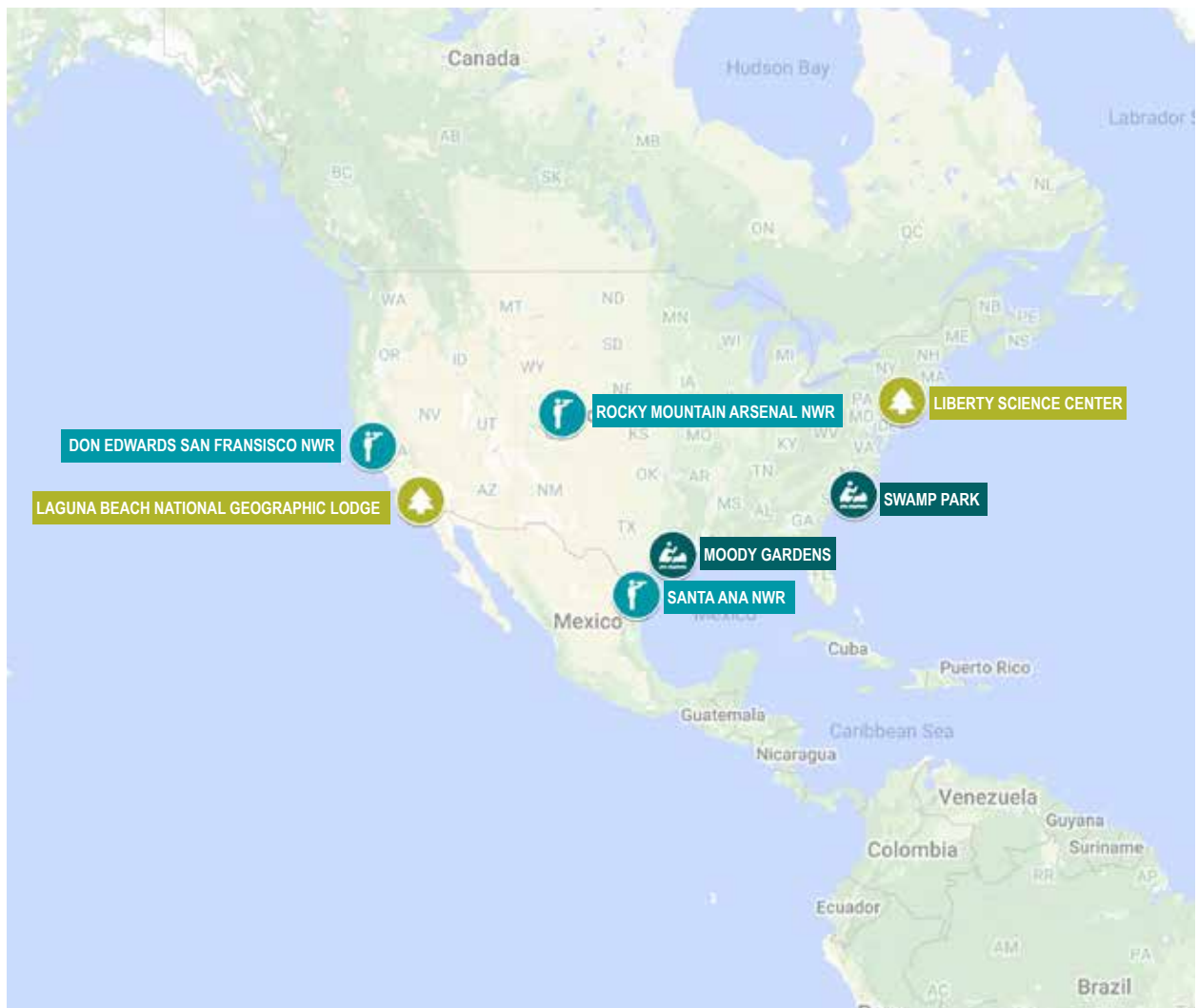
Stakeholder List

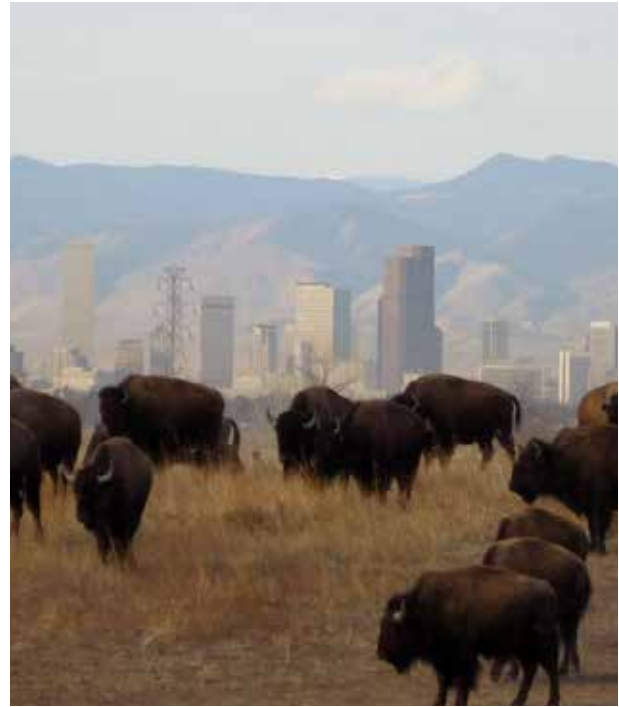
Over the course of the project, the team engaged 40 different stakeholders through individual interviews and workshops. The list of stakeholders is below:

Peter Aamodt, MCC Real Estate
John Bagneris, New Orleans East Business Development District
Stephanie Bell, New Orleans Business Alliance
Derek Boese, Flood Authority
J. C. Celestin, New Orleans East Business Development District
Peter Cho, Delgado Community College
Lacey Conway, Latter & Blum
John Cummings, Land Owner
Louis David, New Orleans Business Alliance
Clifton Davis, City of New Orleans
Chad Dyer, City of New Orleans
Ron Forman, Audubon Nature Institute
Ernest Gethers, City of New Orleans
Eugene Green, Industrial Development Board
Akintude Hardy, staff Councilmember Nguyen
Dawn Hebert, New Orleans East Business Development District
Troy Henry, New Orleans East Business Development District
Nicole Heyman, City of New Orleans
Joe Jaeger, MCC Real Estate
Randy Johnson, Merrill Lynch Wealth Management
Bryan Jourdain, East New Orleans Neighborhood Advisory Commission
Barry Kern, MCC Real Estate
Nolan Marshall, New Orleans Business Alliance
Larry Massey, City Planning Commission
Quentin Messer, New Orleans Business Alliance
Steve Molnar, Entergy
David Morris, City of New Orleans
Cyndi Nguyen, Councilmember District E
Alan Philipson, Industrial Development Board
Marshall Rice, LED
Paul Richard, Latter & Blum
Charlie Romaine, LED
Mtumishi St. Julien, New Orleans East Business Development District
Shelley Stiaes, US Fish & Wildlife Service
Cheryl Teamer, New Orleans & Co.
Kristi Trail, Lake Ponchartrain Foundation
Betty Washington, New Orleans East Business Development District
Lynnette White-Colin, New Orleans Business Alliance
John A. Williams, University of New Orleans

APPENDIX G - CASE STUDIES

To understand the economic potential and programming options, six different destinations were studied. The destinations were examples of ecotourism, environmental tourism, and adventure tourism.





Rocky Mountain Arsenal Urban Wildlife Refuge Denver, CO

15,000 acres of prairie, wetland, and woodland habitat

300,000 visitors in 2013; expected to reach 1 million per year with improvements

The Rocky Mountain Arsenal Urban Wildlife Refuge is located 10 miles from downtown Denver and 16 miles from the Denver International Airport. As the refuge evolved from a Superfund Site to restored habitat and wildlife refuge, a Comprehensive Management Plan that was developed in 1996 has guided the process. The Plan incorporated a community-oriented gateway, a section with education venues, and a restoration area intended for little use. A Public Use Plan targeted potential user groups for recreational, educational, and volunteer activities. The refuge now includes a new 14,000 square foot visitor center, an 11-mile Wildlife Drive, hiking trails, nature programs, fishing, and birding. The refuge is adjacent to the new MLS stadium and the Stapleton Master Planned Community. The surrounding community of Commerce City has also witnessed a renewal of development.



Santa Ana Wildlife Refuge
Rio Grande Valley, TX

2,088 acres

165,000 visitors

The Santa Ana Wildlife Refuge is located along the Texas-Mexico Border, 15 miles from downtown McAllen, TX. The refuge was established in 1943 for the protection of migratory birds. In fact, about 400 bird species have been documented within the refuge's boundaries. As such, the refuge has become a major birding destination with 100,000 of its 165,000 visitors coming there for birdwatching. An estimated 90 percent of these visitors stay three to seven days. The refuge has 14 miles of trails and a 15,000 square foot visitor center. It also has a 100 foot long canopy walk. It is estimated that the visitors to the refuge generate an economic impact of \$34 million.



Don Edwards San Francisco Bay National Wildlife Refuge
Fremont, CA

30,000 acres

750,000 to 900,000 visitors

The Don Edwards San Francisco Bay National Wildlife Refuge is located 25 miles from downtown San Francisco and 17 miles from downtown San Jose. Established in 1972, it was the first urban wildlife refuge in the US. The refuge includes a 2,000 square foot visitor center, a 10,000 square foot administration building, and 38 miles of hiking trails. It is estimated that only about 10 percent of the visitors to the refuge are from outside of the area. It is estimated that the refuge generates an economic impact of \$37 million in visitor spending.



Liberty Science Center Jersey City, New Jersey

Within 1,212 acres of Liberty State Park

750,000 visitors

The Liberty Science Center is located in Jersey City, just across the river from New York City. It opened in 1993 and expanded in 2007 with a 100,000 square foot addition and again in 2017 with the opening of its 400-seat planetarium. The Liberty Science Center consists of a 300,000 square foot learning center with 12 exhibition halls. The exhibitions include a live animal collection and aquariums, a 3D theater and live simulcast surgeries, and hurricane and tornado simulators. As it is located in Liberty State Park, it also has a 2-mile Liberty Walk Promenade with views of the Statue of Liberty.

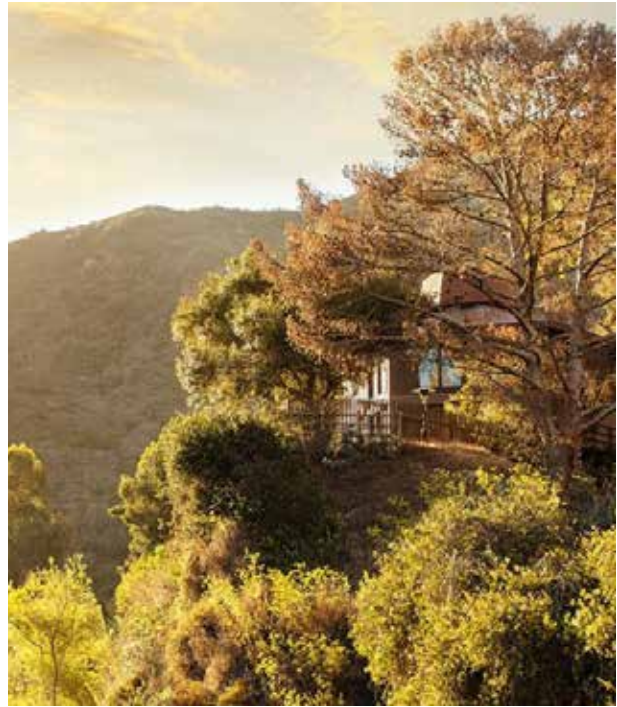


Moody Gardens Galveston, TX

240 acres

2 million visitors

Located on Galveston Island, Moody Gardens is a non-profit educational destination that uses nature to educate and excite visitors about conservation and wildlife. The 240-acre site was developed under an eight-phase master plan that was adopted in 1985. Since its founding in the mid-1980s, Moody Gardens has grown to attract about 2 million visitors annually to its portfolio of attractions. This portfolio includes a rain forest pyramid, an aquarium pyramid, and a discovery pyramid. In addition, there is a white sand beach, an IMAX theater, a hotel/convention center complex, a golf course, and ropes course and zip line. A production area is used to propagate the plants seen on the grounds and for the Medicinal Plant Program and has a water treatment plant that polishes effluent from Galveston's water treatment facility for use on all exterior landscaping. The City of Galveston owns Moody Gardens, but it is funded, operated, and supported by the Moody Foundation.



The Ranch at Laguna Beach Laguna Beach, CA

87 acres

The Ranch at Laguna Beach is a National Geographic Unique Lodge located near Dana Point, a launching pad for local whale watching tours. These lodges are handpicked by National Geographic and share a strong commitment to the pillars of sustainable tourism: protection of natural heritage, protection of cultural heritage, support for local communities, and environmentally friendly practices. The Ranch at Laguna Beach includes a 40,000 square foot lodge with 97 accommodations units. It has access to 7 miles of shore and provides opportunities for gardening, mountain biking, sand volleyball, bocce ball, star gazing, hiking, and campfires. It also includes a sustainably operated 9-hole golf course and a scout camp that offers nature-based youth programs.



Swamp Park Ocean Isle Beach, NC

65 acres

Located 43 miles from Wilmington and 36 miles from Myrtle Beach, the Shallotte River Swamp Park offers adventure excursions to beach go-ers along this section of the Atlantic Coast. The mission of the park owners is to educate visitors about the park's unique ecosystem and help them develop an appreciation for and respect for the natural environment. The nature-oriented eco park features swamp boat tours, a zipline canopy course, a tree-top aerial challenge course, a self-guided educational nature trail, and a guided swamp buggy tour. They also provide scouting organizations with access to camping facilities and support church and corporate groups with team-building programs. Finally, they partner with schools to provide students with nature-based educational opportunities.



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