Greater New Orleans
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Economic ties across Southeast Louisiana

Preliminary findings from commuter data

"In a globalized economy, the competitive advantage of Southeast Louisiana lies in achieving a critical mass of interconnected firms and institutions."

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Summary

The cities of New Orleans, Baton Rouge, and Houma are each the center of a metropolitan region—a larger economic geography where labor is pooled, and innovation and production are concentrated. And yet some scholars suggest that important economic interconnections extend even further, and that "super regions" are forming across proximal metros. Census Bureau data allows us to quantify and visualize these links through cross-metro commuter patterns.

Between 2004 and 2010, commuters between the New Orleans metro and its adjacent metros—Baton Rouge to the north and Houma-Thibodaux to the south—increased 11 percent despite the substantial loss of jobs and population in New Orleans post-Katrina. In 2010, over 26,000 workers commuted from the Baton Rouge metro to the New Orleans metro, while 22,000 workers commuted in the opposite direction. Another roughly 11,000 workers commuted from the Houma metro to the New Orleans metro in 2010, while about 8,000 commuted the opposite direction.

The share of workers that commuted between Southeast Louisiana metros was similar to other multi-metro regions that collaborate on economic development strategies, such as Austin/San Antonio, Cleveland/Akron, Louisville/Lexington, and Tampa/Orlando. In these regions, business and economic development leaders are partnering to identify economic synergies and devise integrated and holistic business plans.

In a globalized economy, the competitive advantage of Southeast Louisiana lies in achieving a critical mass of interconnected firms and institutions. Commuter data provides evidence of existing economic linkages between New Orleans, Baton Rouge, and Houma-Thibodaux. However, more research is needed to identify the industry specializations in each metro and determine how to combine local assets and industry strengths to become a stronger economic super region. Leaders in Baton Rouge and New Orleans have already taken the first steps by working together on common economic development issues.

Introduction

Throughout history, cities were born along important trade routes and over time transformed to become centers of production and innovation where workers and companies congregated. New Orleans' history is no different, as vividly described in Richard Campanella's timeline of our city's evolution. Traffic between the gulf and interior U.S. locations required a transshipment point near the mouth of the Mississippi River. Innovations including the cotton gin, sugar granulation, and the steamboat increased traffic and trade. The discovery of oil and techniques to extract it brought new wealth to our region. And in more recent years, institutions of higher learning have served as key engines of innovation.[1]

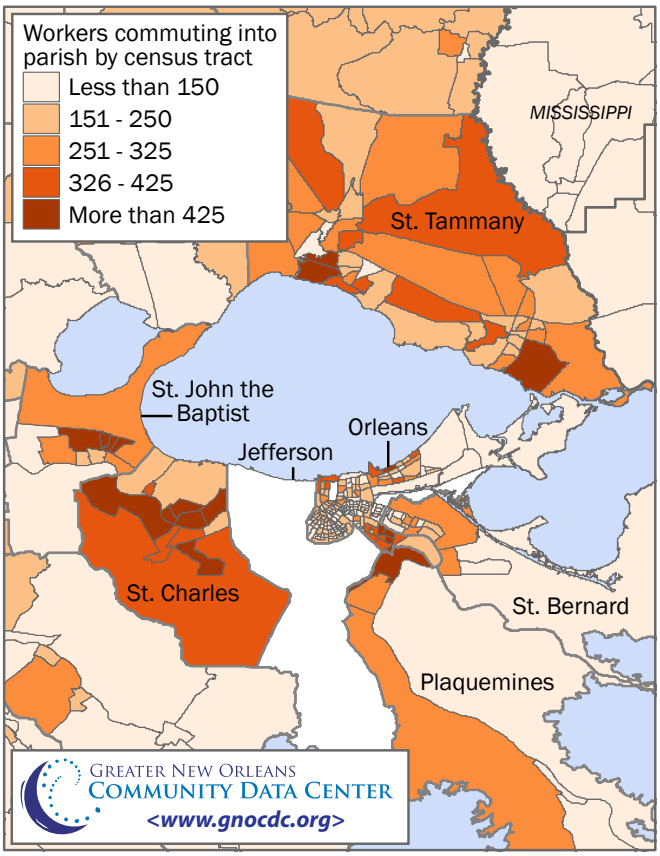
To learn more about Richard Campanella's history of the city's economy, see *Economic Timeline: Selected Historical Events that Shaped the New Orleans Economy, 1700–2010* available at www.gnocdc.org.

Since World War II, significant decentralization has taken place nationwide as the interstate system allowed residents to begin commuting from suburban homes, and later many businesses relocated to suburbs as well. As early as 1949, the Census Bureau recognized the economic dependency of suburbs and city job centers, and began designating "metropolitan areas" based largely on commuting patterns. Today it is widely understood that metro areas are the geography where labor is pooled, and where innovation and production are concentrated.[2]

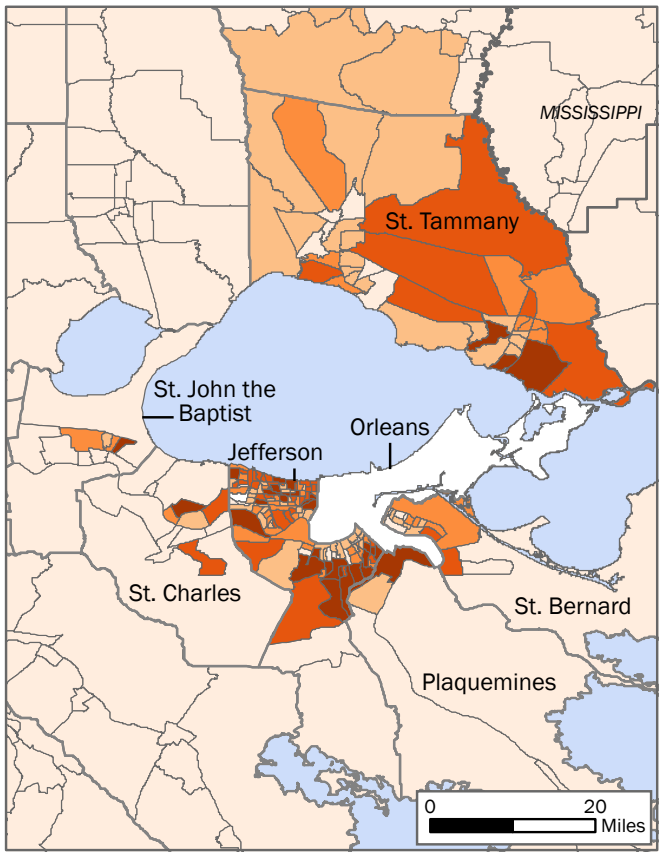
Economic interdependence within the New Orleans region

These maps depict the origin points of workers from outside Jefferson Parish who work in that parish's 186,315 jobs, and workers from outside Orleans Parish who work in that parish's 145,944 jobs. For information about the data source, see p.9.

Workers commuting into Jefferson Parish by census tract, 2010



Workers commuting into Orleans Parish by census tract, 2010



Louisiana's *Southeast Super-Region Committee*

Economic development practitioners in New Orleans and Baton Rouge already know their economies are interdependent. In 2009, Greater New Orleans, Inc. (GNO, Inc.) and the Baton Rouge Area Chamber (BRAC) identified the area stretching from the mouth of the Mississippi River past the state capitol in Baton Rouge as Louisiana's Southeast Super-Region and are collaborating on business development and policy initiatives.

But some scholars suggest that important economic interconnections extend even further than the suburbs, and "super regions" are forming across proximal metros. Evidence of this includes overlapping commuter patterns, increasing freight and information flows, and complementary industries. The literature on this topic is relatively nascent, and the definitions of super regions vary, but evidence is mounting that super regions of various shapes and sizes are the globally competitive new economic geography. (See bibliography of super regions on p.11.)

Some regions are already acting on this mounting evidence. Cities and metropolitan areas such as Cleveland/Akron, Louisville/Lexington, and Minneapolis/St. Paul are teaming up on regional economic development plans to jumpstart their economies. Lacking governmental entities that can coordinate action across these unusual geographies, business and economic development leaders are taking the lead. They are funding research on economic synergies and devising collaborative, holistic, and integrated business plans.

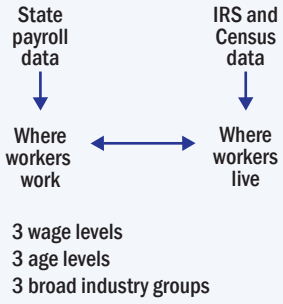
There is some evidence to suggest that the three metros in Southeast Louisiana — New Orleans, Baton Rouge, and Houma-Thibodaux (see the Appendix for a reference map of the parishes within each metro) — have more in common than the overlapping exurbs from which their workers commute. For example, the Brookings Institution ranked the Baton Rouge metro and the New Orleans metro second and thirteenth respectively (among the 100 largest U.S. metros), in the share of their economic output exported internationally in 2010. And the top exporting industries in both Baton Rouge and New Orleans included petroleum products and chemical manufacturing.[3] Although not in the Brookings analysis, the Houma-Thibodaux metro shares similar industries. A look at the 20 largest employers in that metro reveals that 16 are tied to the oil and gas industry or transportation equipment manufacturing[4] — which closely parallels New Orleans' top export industries in the Brookings report.

According to Harvard economist Michael Porter, in a complex and globalized economy, the competitive advantage of a region lies in achieving a critical mass of local interconnected firms and institutions, which leads to increases in productivity, innovation, new business formation, and global competitiveness.[5] With a population of 2,207,914 and 986,200 jobs in 2011, a Southeast Louisiana "super region" would be comparable in size to the Portland, Oregon metro area. It would be larger than the Nashville metro. And it would eclipse the burgeoning Louisville-Lexington super region.[6]

To begin the exploration of economic interconnections across metros in Southeast Louisiana, this brief examines cross-metro commuter patterns as an initial indicator of integrated labor markets. New data made public by the Census Bureau allows us to quantify and visualize these regional interconnections as exemplified through cross-metro commuter patterns.

What is this commuter data?

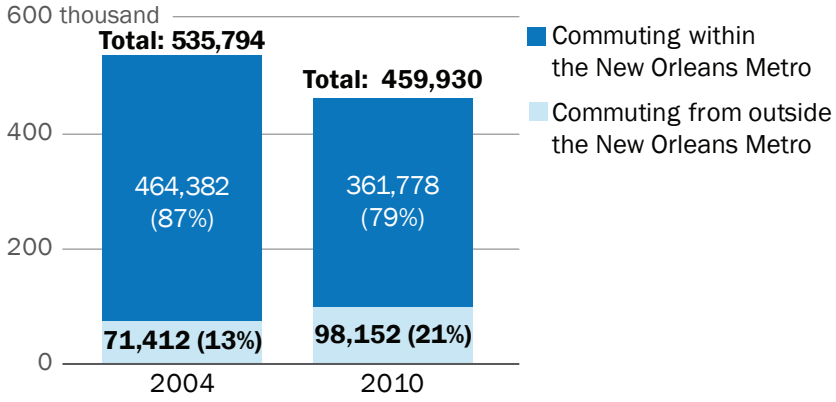
The Census Bureau's Local Employment Dynamics program combines employer payroll data filed with the states and Census Bureau survey data and IRS data to match an employee's place of residence with a place of work. Data is aggregated at the census block level — generally the equivalent of a city block — to ensure confidentiality.



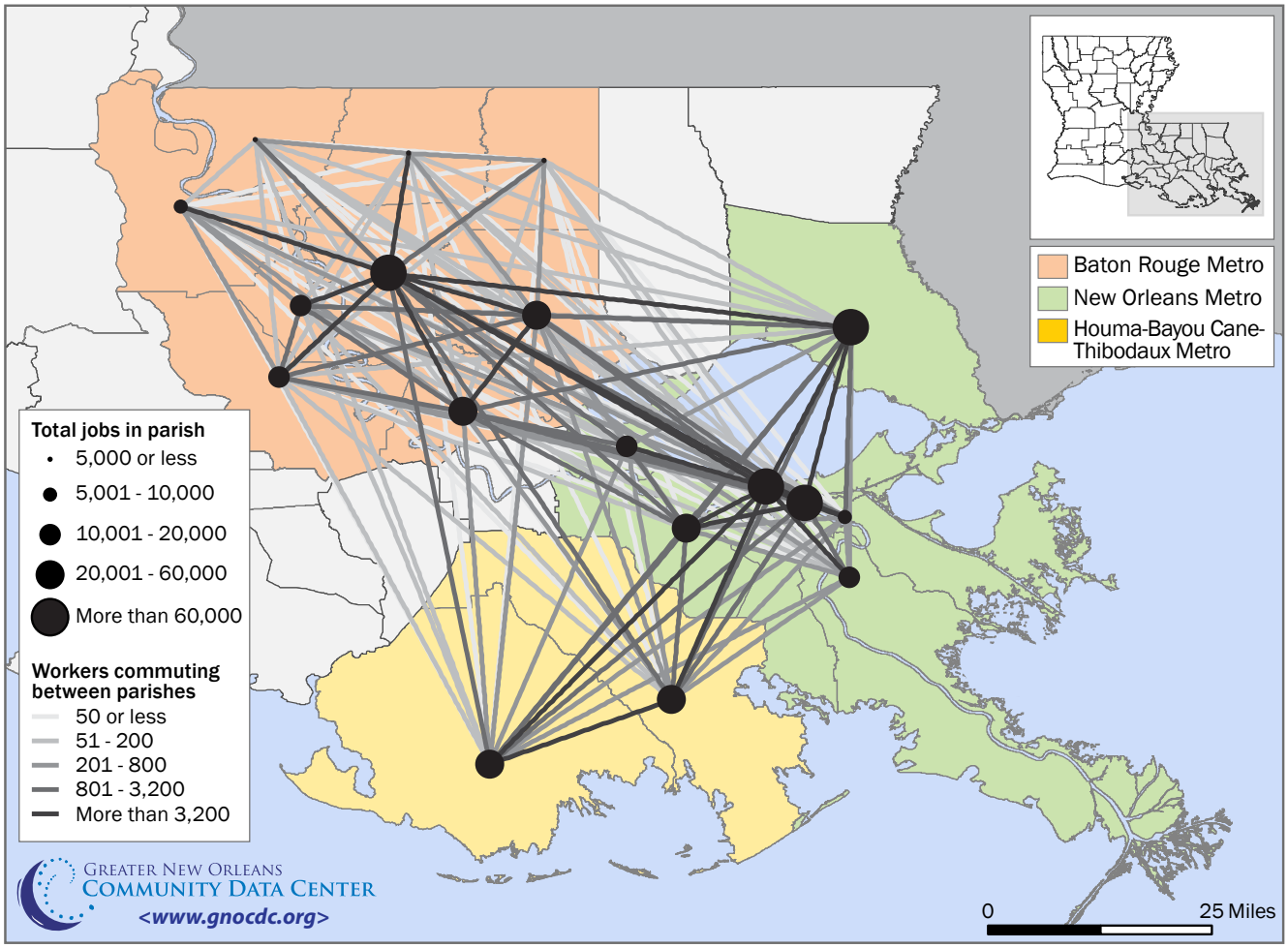
Commuter patterns as a measure of economic integration in Southeast Louisiana

The cross-metro flow map below illustrates that many commutes spill over metropolitan boundaries in Southeast Louisiana. In the New Orleans metro, fully 21 percent of all workers commuted from outside the metro in 2010 — up from 13 percent in 2004. Thus, the reliance of New Orleans metro firms on employees from outside the metro area has increased post-Katrina, despite the fact that the metro now has 100,000 fewer jobs.

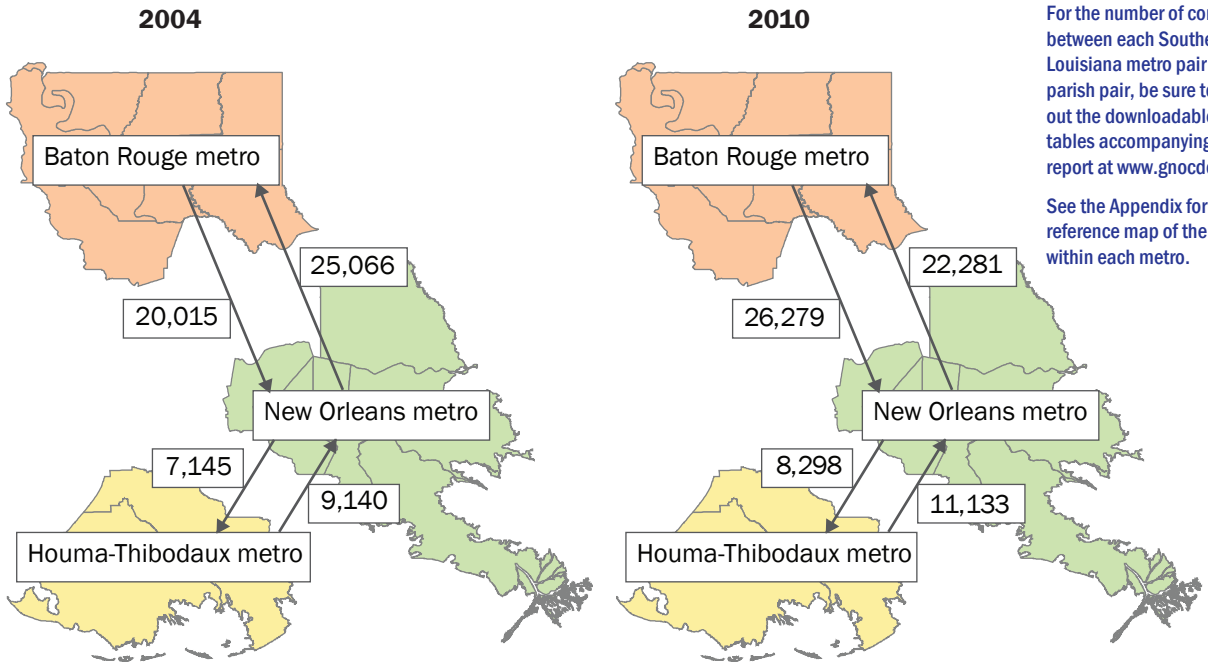
Workers commuting from outside and within the New Orleans metro
Trends in number and share of total workforce



Workers commuting between Southeast Louisiana parishes, 2010
New Orleans metro, Baton Rouge metro, and Houma-Thibodaux metro



Workers commuting between metros in Southeast Louisiana
Trends in number of workers commuting each way



For the number of commuters between each Southeast Louisiana metro pair and parish pair, be sure to check out the downloadable data tables accompanying this report at www.gnocdc.org.

See the Appendix for a reference map of the parishes within each metro.

What are the implications of cross-metro commuter data for transit and housing?

The cross-metro commuter data presented in this report provides one indicator of economic linkages in Southeast Louisiana metropolitan areas. As a measure of shared workforce, the data partially reflects cross-metro commuters living at the border of converging metropolitan areas. Although commuter data has implications for transportation, housing, and land use planning, more detailed data than is available in this report is necessary to guide these policies and investments.

In 2010, over 26,000 workers commuted from the Baton Rouge metro to the New Orleans metro, up from roughly 20,000 commuters in 2004. And about 22,000 workers commuted in the opposite direction — a decrease from 25,000 six years earlier when the New Orleans metro had substantially more population than today. In 2010, roughly 11,000 workers commuted from the Houma-Thibodaux metro to the New Orleans metro while about 8,000 commuted the opposite direction. Cross-metro commuters between these metro pairs have increased 11 percent overall since 2004. These numbers suggest increasing workforce integration between the New Orleans metro and the Baton Rouge and Houma-Thibodaux metros post-Katrina.

How do we stack up against other super regions?

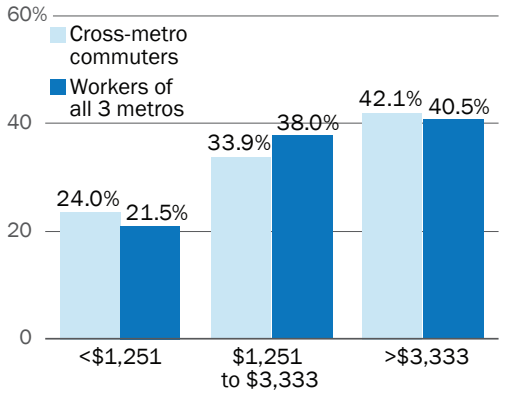
Using commuter data to compare the strength of economic connections in Southeast Louisiana to other super regions is challenging. The definition of a "super region" has not yet been standardized, and scholars define super regions in various ways. In fact, some scholars argue that super regions are a "dynamic economic geography" whose boundaries should be flexible and anticipate future changes.[7] Compounding the challenge of non-standard geographic definitions are the numerous variables that might affect the number of commuters between any two metros. Finally, it is important to keep in mind that commuter data is just one measure of economic linkages. Other measures such as freight flows, industry specializations, and industry clusters may reveal stronger economic connections than commuter data. Nonetheless, it is useful to provide several comparisons to begin to assess the strength of economic linkages in Southeast Louisiana.

For a relevant comparison group, we chose metropolitan areas that have collaborated on regional economic development plans. Louisville and Lexington are developing a plan to combine their strengths in advanced manufacturing.[8] Cleveland and Akron (along with three smaller metros)

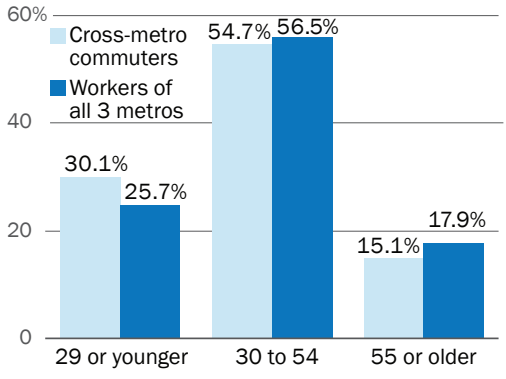
Who exactly is commuting across Southeast Louisiana?

Based on the limited data available from the Census Bureau, cross-metro commuters do not differ substantially from the average worker. Workers who commute between New Orleans and the Baton Rouge and Houma-Thibodaux metros are slightly more likely than the average worker to be either earning less than $1,251 per month or earning more than $3,333 per month. In addition, these cross-metro commuters are more likely to be younger than age 30, about equally likely to be ages 30 to 54, and less likely to be age 55 or older compared to the average worker.

Commuters by monthly earnings, 2010
New Orleans metro, Baton Rouge metro, and Houma-Thibodaux metro



Commuters by age, 2010
New Orleans metro, Baton Rouge metro, and Houma-Thibodaux metro



Note: Cross-metro commuters are defined as workers who commute (in either direction) between the Baton Rouge metro and New Orleans metro as well as between the Houma-Thibodaux metro and New Orleans metro.

The number of cross-metro commuters by earnings group and age group is available in downloadable data tables accompanying this report. Planners may want to look at these more detailed data to identify implications of the wage and age group characteristics.

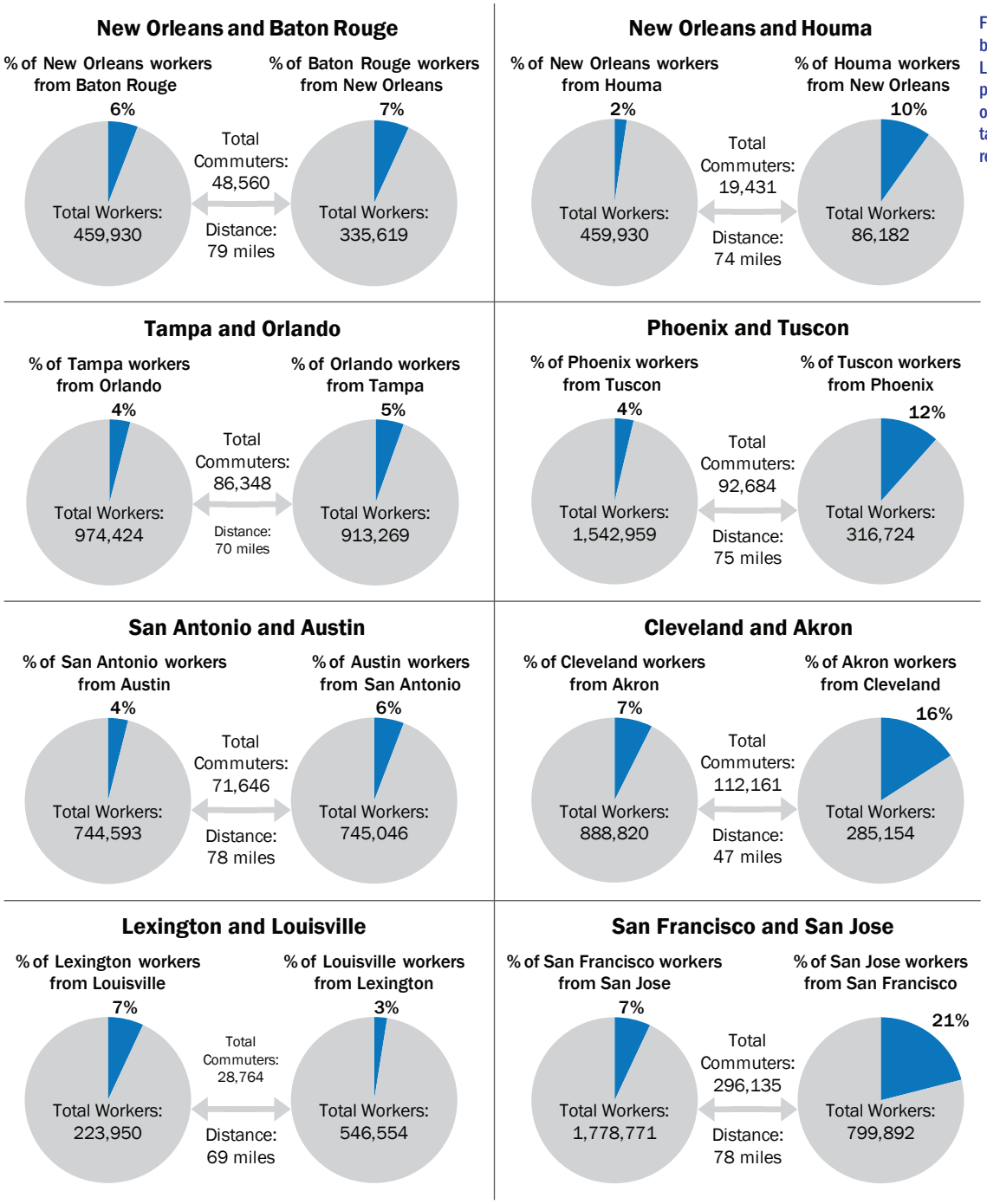
released a regional business plan in 2011 that aims to reorganize Northeast Ohio's traditional manufacturers to produce New Economy products (see p.8).[9] San Francisco and San Jose are working together to identify global trading partners to broaden their possibilities of trade and exchange.[10] In Arizona's "Sun Corridor," Phoenix and Tucson are working together to leverage their unique assets—an airport hub in Phoenix and a university research hub in Tucson — to become a leader in the solar technology industry.[11] The Greater Austin-San Antonio Corridor Council promotes regional economic development and cooperation across the San Antonio and Austin metros, including hosting the Texas Greenbelt Coalition, which facilitates public and private partnerships to grow more clean-tech jobs in Central Texas.[12] Finally, Tampa and Orlando have studied the possibility of linking their cities, and their respective ocean port and international airport, via light rail. Despite setbacks to that initiative, business leaders continue to develop a long-term vision for their super region and host an annual super region conference with roughly 400 participating business and government officials.[13] The cities are also part of the Florida High Tech Corridor Council, a regional high tech economic development initiative, led by the University of Central Florida, the University of South Florida, and the University of Florida.[14]

For two Southeast Louisiana metro pairs and six comparison metro pairs, the graphic on p.7 shows the percent of workers in each metro who represent commuters from the paired metro in 2010. The lower the percentage, the less a particular metropolitan area is dependent on commuters from the paired metropolitan area to fill jobs. The Baton Rouge and New Orleans metropolitan areas have roughly similar numbers of jobs and workers, and thus the share of total workers contributed by the paired metro is also similar—6 percent of workers in the New Orleans metro commuted from the Baton Rouge metro and 7 percent of workers in the Baton Rouge metro commuted from the New Orleans metro. However, the Houma-Thibodaux metro is quite a bit smaller than the New Orleans metro, thus the shares of workers contributed by each metro to the other are not as well balanced—2 percent of workers in the New Orleans metro commuted from the Houma-Thibodaux metro while 10 percent of workers in the Houma-Thibodaux metro commuted from New Orleans metro.

The relative size of the workforce between two metros is an important factor to consider when making comparisons of cross-metro commuting. The distance between two metropolitan areas and various other factors no doubt also play a role in the number of cross-metro commuters. But in general, the cross-metro commuting that exists between the New Orleans metro and the Baton Rouge and Houma-Thibodaux metros appears to be similar to cross-metro commuting levels in other super regions that have found advantages in collaborating on regional economic strategies.

Cross-metro commuters in paired metros, 2010

Share of workers in each metro who represent commuters from the paired metro



For the number of commuters between each Southeast Louisiana metro pair and parish pair, be sure to check out the downloadable data tables accompanying this report at www.gnocdc.org.

Note: Distance between metros is measured as the distance from the geographic centroid of the "job center" parish/county in each metro pair. The center parish in each Southeast Louisiana metro is Orleans, East Baton Rouge, and Terrebonne, respectively, for the New Orleans metro, Baton Rouge metro, and Houma-Thibodaux metro.

Implications

Commuter patterns indicate that the New Orleans, Baton Rouge, and Houma-Thibodaux metropolitan economies are connected, but provide little actionable information for coordinating a super regional economic development strategy. A rigorous analysis of industry specializations within each Southeast Louisiana metro is needed to develop a clearer understanding of economic connections, and determine how the region might work together to leverage unique assets and shared industry strengths. Once specific economic linkages between Southeast Louisiana metros are identified, a super regional approach to economic development planning could include industry cluster development like that occurring in Northeast Ohio and Seattle/Puget Sound.

In Northeast Ohio, leaders from five metros including Cleveland, Akron, and Youngstown, have conducted a rigorous market analysis of their region and crafted a business plan for capitalizing on their market strengths and distinctive assets. In response, the Partnership for Regional Innovation Services to Manufacturers (PRISM) was launched to help manufacturers transition to high-growth markets like fuel cell components, flexible electronic displays, and wind turbine equipment. PRISM is a collaboration of local universities, a regional high-tech economic development organization, and the state of Ohio to provide research, capital, and intensive consulting services to individual firms.[15]

In the Seattle/Puget Sound region, public and private sector leaders across two metros have crafted a regional business plan that capitalizes on the region's strength in innovation and sustainability. The plan resulted in the creation of the Building Energy-Efficiency Testing and Integration Center to help local businesses bring innovations in energy-efficient technologies to market.[16]

In addition, leaders in Southeast Louisiana may find it advantageous to jointly plan infrastructure to facilitate flows of goods and information. For example, the Southern California super region (Los Angeles/San Diego) is developing solutions to crushing traffic congestion — in part resulting from the region's rapid escalation in port traffic — including improved intermodal transportation and land use.[17] And while Houston's economy may have greater links to New Orleans as part of the "Energy Coast" megaregion (see below), there is a growing chorus in Texas calling for improving freight systems between Houston, Dallas-Fort Worth, and Austin based on significant truck-transported goods movement between these cities.[18]

Many super regions are also working to address quality-of-life and resource management issues. For example, super regions understand that shifting poverty from one jurisdiction to another does nothing to solve the problem of poverty. And water management is critical to the vast population centers in the Southwest that depend on the Colorado River. Similarly, Texas has expressed interest in

The "Energy Coast" Megaregion

Just as economies are not hemmed in by city boundaries, they are not hemmed in by state borders either. Although most super regional collaborations that have formed are among contiguous metros within a single state, scholars argue that economic links transcend state boundaries and that megaregions have formed along the East Coast, West Coast, Gulf Coast, and interior corridors like I-35. New Orleans, Baton Rouge, and Houma are generally considered to be part of the "Energy Coast" megaregion that includes Houston, Mobile, and much of the Gulf Coast.[19] While there are undoubtedly complementary industries across the "Energy Coast," cross-state planning is rare simply because so many of the policies that can enhance economic development and infrastructure originate at the state level. Thus, super regional collaborations tend to be state-specific. But cross-state partnerships are not impossible, as evidenced by the contra-flow agreements between Louisiana and Mississippi that aid in the evacuation of our regions when hurricanes approach. In another emerging example of cross-state collaboration, economic development entities across New Orleans, Houston and Mobile have joined forces to create the Gulf Coast Economic Partnership to address economic issues impacting the Gulf Coast.

accessing the waters of the Mississippi River, and as hydraulic fracturing for natural gas extraction increases in Louisiana and surrounding states, the management of water sheds will become increasingly important. To be sure, water management may necessitate larger scale inter-state coordination.[20] As another example, the restoration of coastal lands damaged by the 2010 Deep-water Horizon oil spill may spur coordination across five states that have economies tied directly to the vitality of the Gulf Coast. Finally, megaregions may be the appropriate scale for evacuation planning. For example, according to one study, thousands of Katrina evacuees landed in Baton Rouge and Houston —unsurprising given the economic interconnections along this so-called "Energy Coast."[21]

Conclusion

In a complex and globalized economy, the competitive advantage of Southeast Louisiana lies in achieving a critical mass of local interconnected firms and institutions.[22] The commuter data in this report provides evidence of existing economic linkages between New Orleans, Baton Rouge, and Houma-Thibodaux. However, more research is needed to identify the industry specializations in each metro and determine how to combine local assets and industry strengths across three metros to become a stronger economic super region. Public and private leaders in Baton Rouge and New Orleans have already taken steps toward super regional collaboration by forging a strategic partnership to work together on common economic development issues.

Within a single metro, neighboring municipalities may come into conflict over issues such as political representation and the siting of subsidized housing. But these squabbles are trivial compared to their economic interdependence as evidenced by the thousands of residents, workers, and executives who cross their boundaries on a daily basis to conduct business. Similarly, neighboring metros may enjoy healthy sports rivalries and may even compete directly for some federal investments, but when it comes to developing and diversifying core industry clusters, attracting venture capital, and modernizing infrastructure to optimize freight flows, they may find their greatest allies are right next door. As Colorado Governor John Hickenlooper so eloquently observed "collaboration has become the new competition."[23]

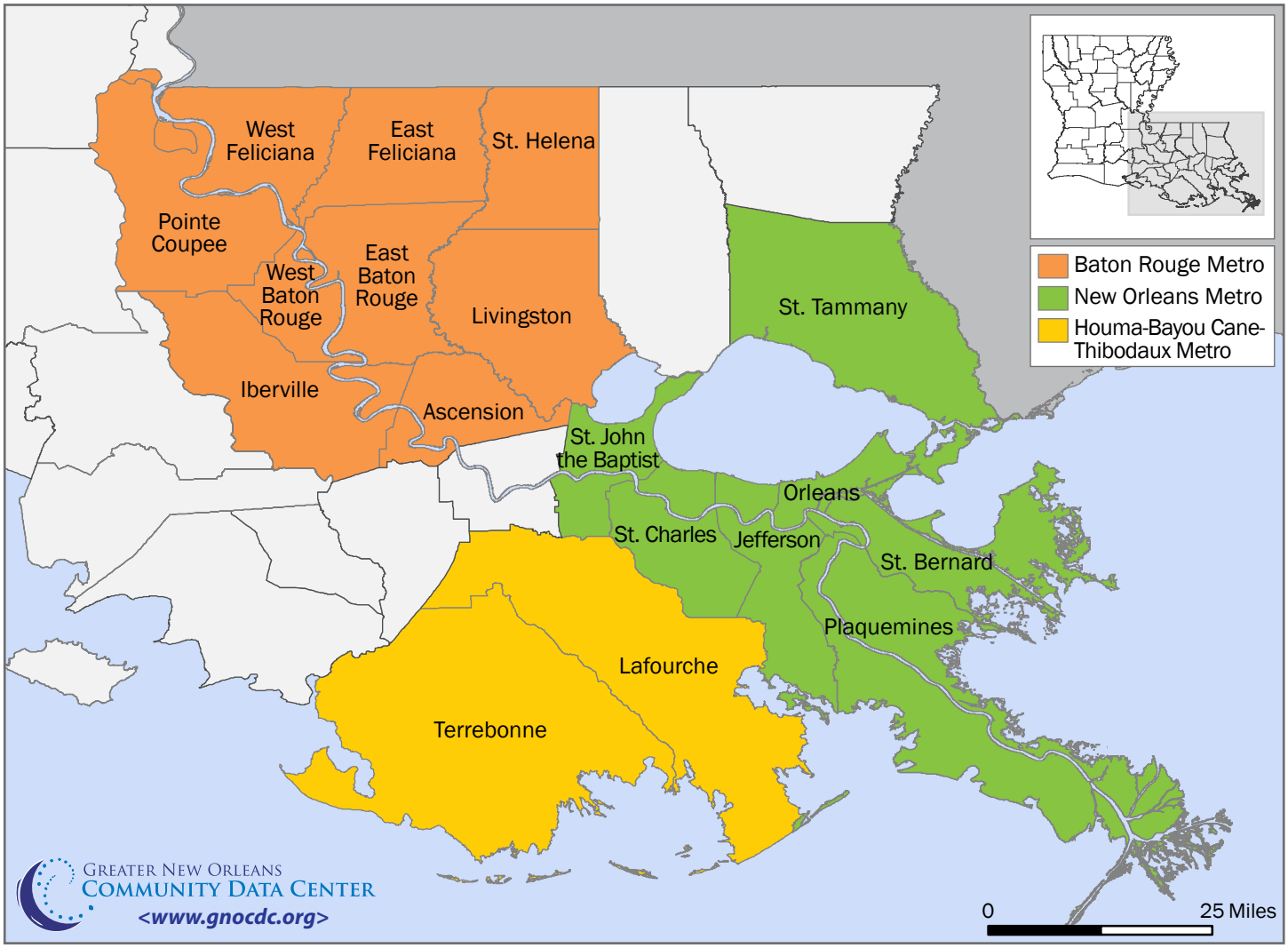
About the data source

The source for all data on commuting patterns in this report is the Census Bureau's Local Employment Dynamics (LED) program, which combines employer payroll data filed with the states and Census Bureau survey data and IRS data to match an employee's place of residence with a place of work. Data is aggregated at the census block level — generally the equivalent of a city block — to ensure confidentiality.

Approximately 96 percent of the wage and salary civilian labor force and 98 percent of non-agricultural employment are reported in the state payroll data. The prime exclusions to coverage are self-employed individuals, agriculture workers, U.S. Armed Forces military personnel, and work-study students.

There are several important limitations of the LED data from the Census Bureau. The LED data unite place of work and place of residence regardless of whether the commute is physical, a telecommute, or a temporary consultancy. In addition, some jobs, particularly government sector jobs, may be reported at a central administrative office rather than where the compensated activity actually occurs. Finally, the data includes only commutes to a person's primary job, which is the highest paying job for an individual worker for the year. This ensures that each worker is counted only once in his/her parish of residence. However, it also means that a small number of jobs are missing from the job counts.

Appendix: Reference Map



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About the Greater New Orleans Community Data Center

Since 1997, the Greater New Orleans Community Data Center (GNOCDC) has been gathering, analyzing, and disseminating data to help leaders at all levels work smarter and more strategically.

A product of Nonprofit Knowledge Works, GNOCDC plays a critical role in assessing the strength of the New Orleans economy and housing market since the onset of the Great Recession. GNOCDC is also recognized across the country for expertise in New Orleans demographics, disaster recovery indicators, and actionable data visualization.

Acknowledgments

The authors are grateful to the many people who reviewed this report and provided valuable feedback, including Ryan Albright, Robin Barnes, Liza Cowan, Mark Davis, Rachel DiResto, Jo-anna Jones, Josh Manning, Leo Marretta, and John Spain. The authors also thank our team members for their significant contributions to this report. Charlotte Cunliffe and Susan Sellers provided editorial support. Melissa Schigoda supplied information design and layout.

In addition, the authors are grateful to Richard Campanella for substantially improving and providing critical guidance for this report.

Finally, the Data Center wishes to thank Metropolitan Opportunities Fund at the Greater New Orleans Foundation, Baptist Community Ministries, United Way of Southeast Louisiana, Rosa-Mary Foundation, Surdna Foundation, and Foundation for Louisiana for their ongoing support.