

Governmental Project: “How multi-locationality changes regional and population structure”

17.3.2021

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Ministry of the Environment , Department of the Built Environment

Government's analysis,
assessment and research activities

Sustainable multi- local living in Finland now and in 2030

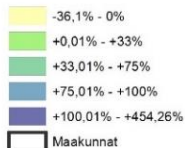
17 March 2021

Research consortium:
MDI Public, Finnish Environmental Institute, and
Natural Research Institute Finland

What is multi-locality?

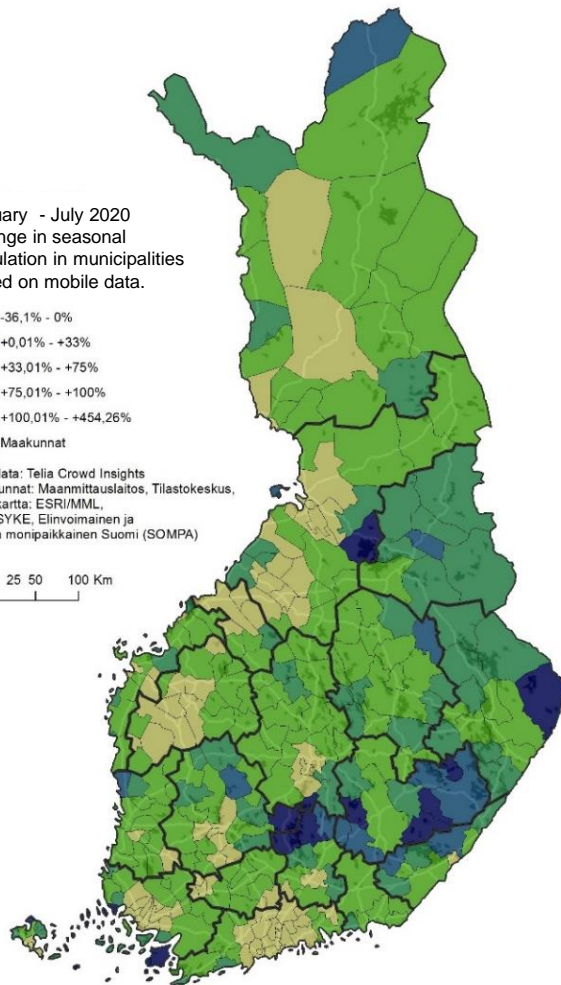
- People spend their everyday life or leisure time in several places, transiting between them.
- Daily multi-locality
- Multi-local living
- Place-independence \neq multi-locality
- Population statistics link people to their permanent residence
- Population varies both daily and seasonally in regions, municipalities, cities, and villages
- Mobile data permits the local and regional analysis of population flows and monitoring of the seasonal population, but it does not tell who the multi-local residents are

January - July 2020
Change in seasonal
population in municipalities
based on mobile data.



Mobiilidata: Telia Crowd Insights
Seutukunnat: Maanmittauslaitos, Tilastokeskus,
Taustakartta: ESRI/MML,
Kartta SYKE, Elinvoimainen ja
kestävä monipaikkainen Suomi (SOMPA)

0 25 50 100 Km



Who are multi-local?

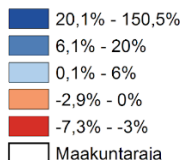
Motive	Type of multi-locality	Volume
Work / study	Commuting Seasonal work Remote work Studying	860 000 work in another municipality, 81 000 commute 100 km+ ~80 000 seasonal workers annually (agriculture, tourism) Pre-Covid: 350 000 on weekly basis, Covid time: 1,2 million 230 000 youth under 25 living independently
Leisure	Leisure homes Tourism	512 000 leisure homes, 2.4 million users 12 million clients in tourist accommodations in 2019
Family	Children with two homes Primary caring from afar	150 000 children living in two homes ~65 000 persons acting as primary carers from a distance
Forced	Homelessness Children / youth in care Refugees	4 600 homeless 19 000 children & youth placed outside their home

Multi-locality varies in different areas

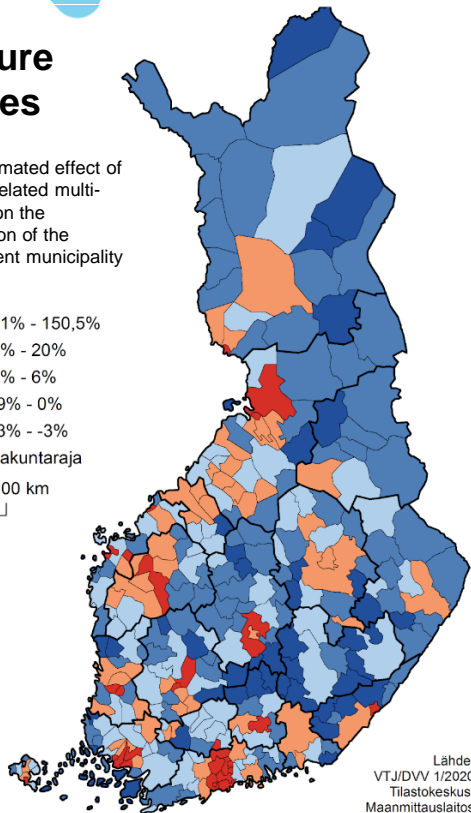
- Leisure-related multi-locality increases the rural population
 - Leisure homes: transfer of 175 000 person-years between municipalities (urban -3%, rural +7%)
- Diversity of multi-locality best seen in the cities
 - Multi-locality related to work and study
 - Work-related second homes: transfer of 23 000 person-years between municipalities
 - Also: family reasons, forced multi-locality
- Effects of place independent work
 - Reduces the need for work-related second homes and daily commuting
 - Increases the daily population in the commuter belt (towns and rural area) of the largest cities
 - Reduces the daily population in the cities
 - Effect at most 2-4% person-years
 - Mixing of work and leisure ('worcation'), in Finland especially working from the leisure home

Leisure homes

The estimated effect of leisure-related multi-locality on the population of the permanent municipality in 2019



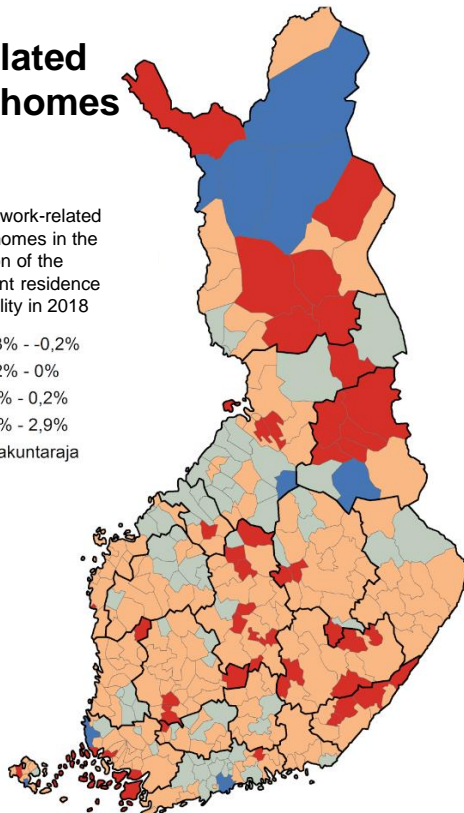
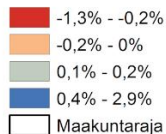
0 50 100 km



Lähde:
VTJ/DVV 1/2020,
Tilastokeskus,
Maanmittauslaitos.

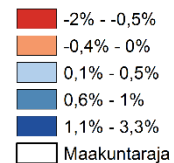
Work-related second homes

Effect of work-related second homes in the population of the permanent residence municipality in 2018

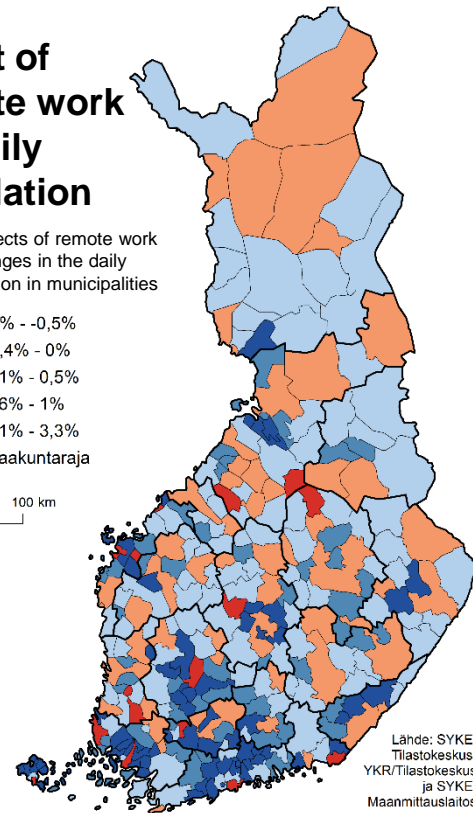


Effect of remote work on daily population

The effects of remote work on changes in the daily population in municipalities



0 50 100 km



Lähde: SYKE,
Tilastokeskus,
YKR/Tilastokeskus
ja SYKE,
Maanmittauslaitos

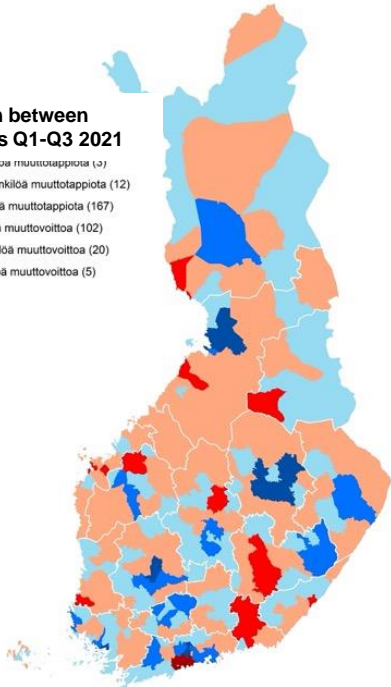
Future of multi-locality

Results of forecast models based on the Statistics Finland 2021 population growth estimate

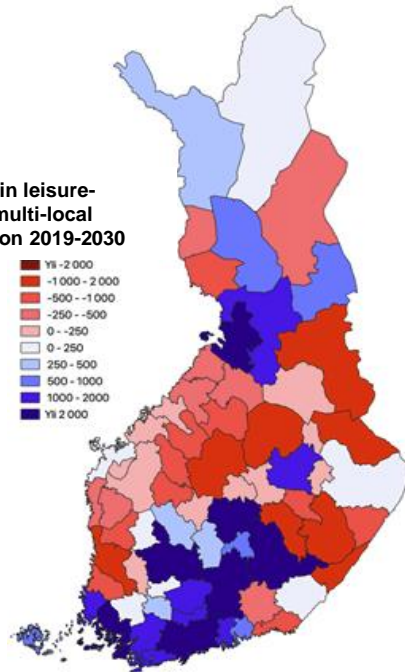
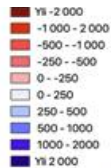
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Multi-locality changes demography

Net migration between municipalities Q1-Q3 2021



Change in leisure-related multi-local population 2019-2030



Urbanisation continues but multi-locality spreads population to the commuter belt and smaller, reachable towns.

Concentration of working-age population in large urban areas.

Local impact can be large, e.g. total population estimate (incl. people with leisure homes): Kustavi +139% of resident population)

Significant seasonal (Jan/Jul) variation in population e.g. Helsinki - 24%

Leisure-related multi-locality: ageing and concentrating

- Finnish population is ageing and urbanising
- Most of the leisure home owners are in pension age already
- Distance of leisure home to cities is important (around 1,5 hours)
- The leisure-related multi-local population will age sharply in the 2020s: 75 yrs+: increase of 100 000
- Significant impact on the demand of services and consumption patterns
- Demand for leisure homes increases in Southern Finland
- Remote rural areas not expected to thrive in terms of leisure homes

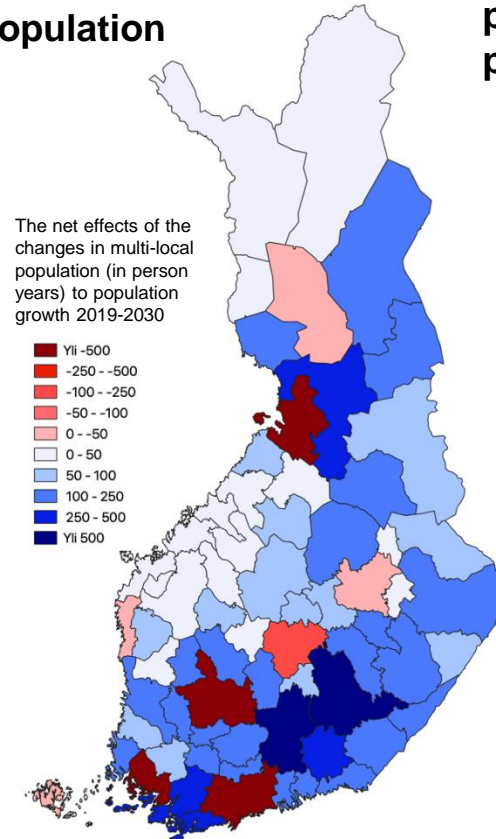
Work-related multi-locality: ageing and concentrating

- Permanent population becoming increasingly urban
- The commuter belt is widening
- Commuter flows will increase in the commuter belts of cities and between cities
- Work-related multi-locality will strengthen *between* and *within* urban areas
- Remote work is a 'wild card' which can significantly reduce the commuter flows in all areas
- Central question: what will be the role of remote work after the Covid-19 pandemic has faded?

Multi-local and permanent population

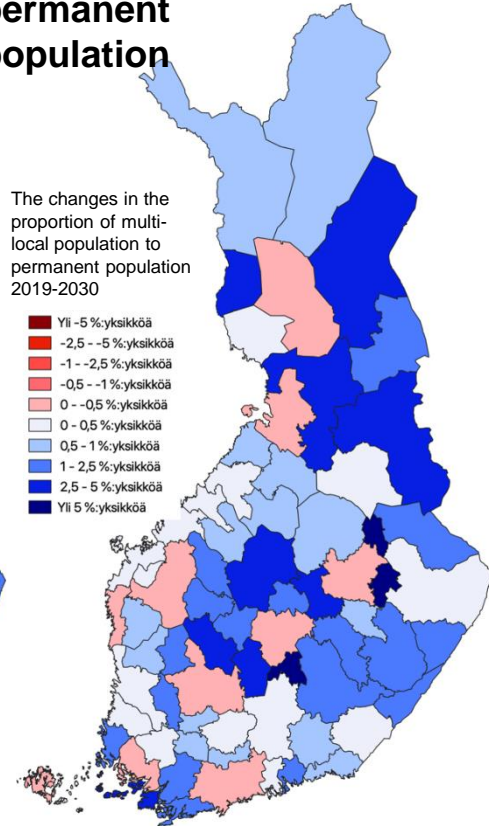
- **The increase of multi-local population partially evens out the regional (permanent) population estimates. When taking the multi-local population into account**
 - The population growth is reduced in growing (urban) areas
 - The population decline is smaller in shrinking (rural) areas
 - Net effect, however, is small
- **Multi-local population grows and permanent population shrinks in several areas.** As a result, the importance of leisure-related multi-locality grows in these areas.
- **Multi-locality does not treat all areas equally. Especially areas with a lot of leisure homes reap the benefits.** Multi-locality will polarise the development of rural areas in the future.

Net effects of multi-local population



Proportion of multi-local population to permanent population

The changes in the proportion of multi-local population to permanent population 2019-2030





Main conclusions

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Multi-locality is an umbrella term

- The term multi-locality contains several different phenomena with different drivers, hindering factors, target groups, and areas.
- Some of the phenomena overlap with each other (e.g commuting and remote work).
- For clarity, sub-concepts (e.g. remote work, leisure living, commuting) should be used
- The study of multi-locality should be done at the level of sub-concepts

Statistics related to multi-locality must be improved

- Population statistics are based on an idea of single location
- Collection of reliable statistics on multi-locality is challenging
 - The statistical data is collected and administered by different bodies
 - There are gaps in statistics
 - The statistical data is not always easily accessible
- Use of mobile data is promising but not a panacea

Multi-locality should be taken into account in service provision

- Seasonal population changes the geographical location of service demand (e.g. rescue services, health services)
- Seasonal peaks/lowes in service demand in different areas
- More information is needed
 - Regional information on multi-local population
 - Effects of ageing leisure population on service demand and service network

Sustainability of multi-locality should be improved

- The emissions related to leisure-related multi-locality come mainly from transport and energy
 - Improvements in sustainable energy solutions and energy efficiency of leisure homes
- Improving the social sustainability of remote work
 - Setting up and utilization of communal working hubs
- Modifying the structure of the commuter tax deduction to emphasise long commutes and increase the support for public transport in urban areas



Government's analysis,
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Thank you!

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MDI



Thanks!

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