



SYNTHESIS INE @ COVID-19

December . 02 . 2020

Statistics Portugal makes available the weekly report for monitoring the social and economic impact of the COVID-19 pandemic.

This report covers the press releases concerning:

- Tourism activity – September 2020, published on November 16;
- Transport activities - Air Transport Flash Statistics – September 2020, published on November 17;
- Industrial production price index – October 2020, published on November 18;
- Monthly Economic Survey – October 2020, published on November 18;
- Information and knowledge society – 2020 household survey, published on November 20;
- Context indicators for the COVID-19 pandemic in Portugal, published on November 20.

For further details, see the links available throughout this press release.

Tourist activity has not recovered in September Alentejo and Algarve with increases in overnight stays of residents

In September 2020, the tourist accommodation sector accounted for 1.4 million guests and 3.6 million overnight stays, corresponding to year-on-year rates of change of -52.7% and -53.4% respectively (-43.6% and -47.1% in August 2020, in the same order).

Overnight stays of residents declined by 8.5% (-1.5% in August) and those of non-residents decreased by 71.9% (-72.4% in August) compared to the same period in 2019.

By type of accommodation, the outcome concerning the number of overnight stays in September, in year-on-year terms, was as follows:

- Hotel establishments (79.8% of total overnight stays): -54.9%;
- Local accommodation establishments (14.9% of total overnight stays):
 - » Hostels (17.8% of overnight stays in local accommodation): -62.0%.
- Rural tourism and lodging (5.4% of total overnight stays): -16.2%.

In the first nine months of 2020, there was a 61.3% decrease in the total overnight stays, as a result of rates of change of -33.3% in residents and -73.4% in non-residents.

SYNTHESIS INE @ COVID-19

December . 02 . 2020

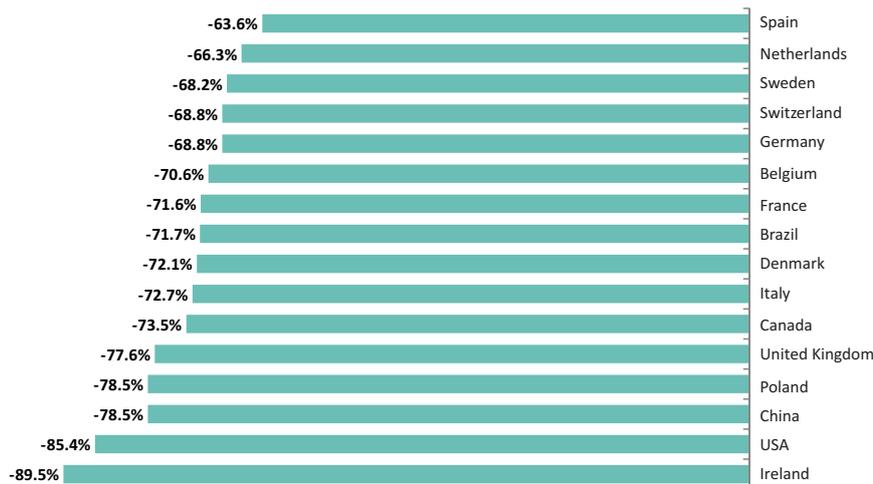
Overnight stays and Guests in September 2020

	Overnight stays		Guests	
	10 ³	Year-on-year change	10 ³	Year-on-year change
Total	3 551,7	-53.4%	1 370,9	-52.7%
Residents	2 032,4	-8.5%	887,3	-15.4%
Non-residentes	1 519,3	-71.9%	483,6	-73.8%

In September 2020, 24.0% of the tourist accommodation establishments were closed or had no movement of guests (22.8% in August).

In the first nine months of the year, there were steep declines (over 60%) in the number of overnight stays of tourists from the 16 main inbound markets, with the emphasis on the Irish and North American markets.

Overnight stays in tourist accommodation establishments by main countries of origin of tourists – Jan - Sep 2020 (year-on-year rate of change)

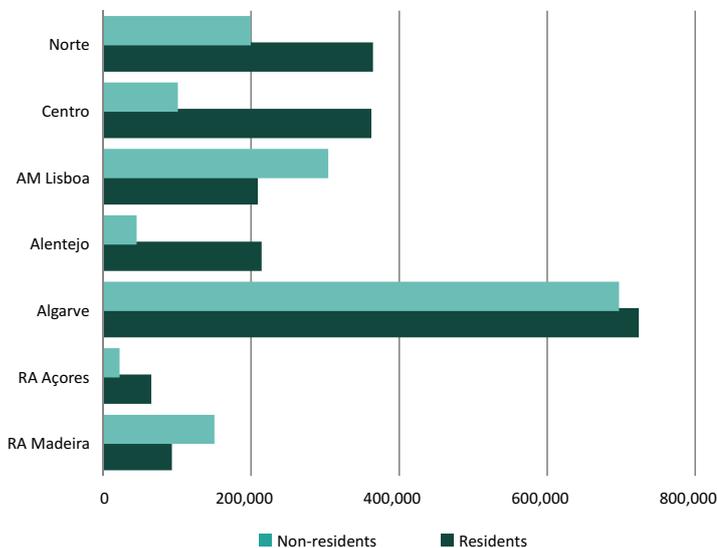


In September 2020, tourists from these 16 countries represented 93.0% of overnight stays of non-residents spent in tourist accommodation establishments, given that:

- The largest reductions were registered in tourists coming from:
 - » The USA: -95.6%;
 - » China: -94.9%;
 - » Canada: -94.8%;
 - » Ireland: -91.7%.
- The lowest decreases were registered in tourists coming from:
 - » Belgium: -49.6%;
 - » The Netherlands: -51.1%;
 - » Spain: -51.8%;
 - » Switzerland: -55.2%.



Overnight stays in tourist accommodation establishments, by region NUTS II – September 2020



All the Portuguese NUTS II regions accounted for decreases in overnight stays in September 2020:

- The lowest decreases were registered in Algarve (-44.8%), Centro (-40.5%), and Alentejo (-20.9%);
- The largest reductions were registered in Área Metropolitana de Lisboa (-71.8%), Região Autónoma dos Açores (-66.3%), and Região Autónoma da Madeira (-66.2%).

Nonetheless, there were increases in the number of overnight stays of residents in Algarve (+10.1%) and Alentejo (+3.9%).

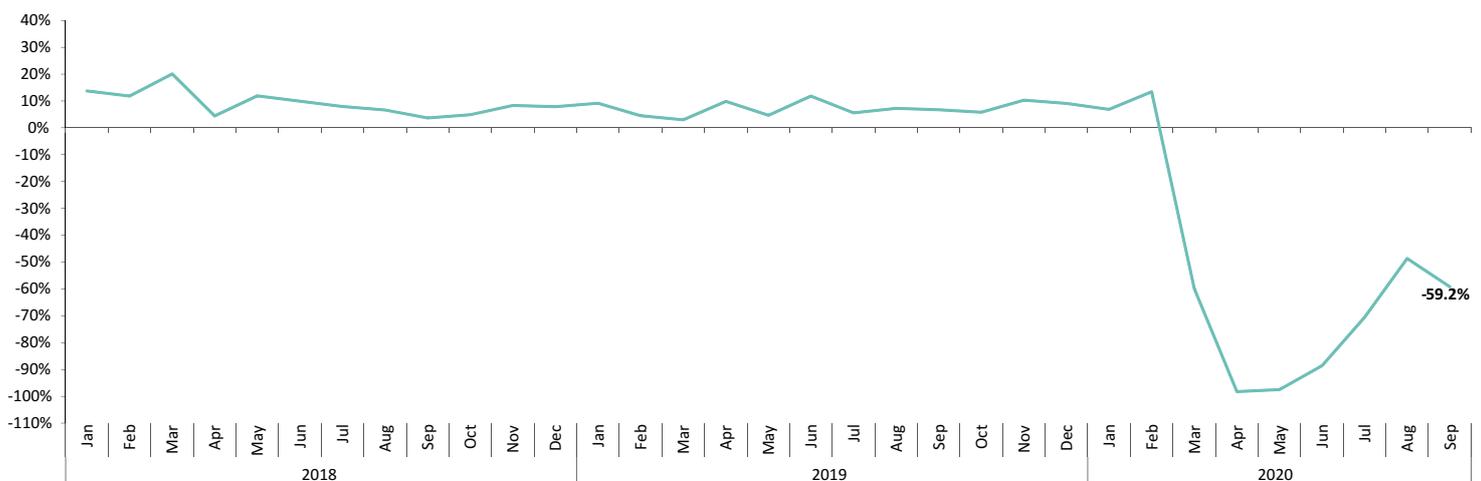
Algarve concentrated 40.0% of overnight stays, followed by Norte (15.9%), Área Metropolitana de Lisboa (14.4%), and Centro (13.0%).

In the first nine months of the year, the regions that presented the smallest decreases in the number of overnight stays were Alentejo (36.4%), Centro (-50.4%), and Norte (-56.5%).

In September 2020, considering all tourist accommodation establishments:

- The average stay of guests (2.59 nights) declined by 1.6% (-6.3% in August);
- The total revenue of the tourist accommodation establishments was EUR 204.8 million, i.e. a year-on-year rate of change of -59.2% (-48.7% in August).

Revenue in tourist accommodation establishments (year-on-year rate of change)



In September, all regions recorded steep declines in total revenue, more so Área Metropolitana de Lisboa (-80.1%), Região Autónoma dos Açores (-69.6%), and Região Autónoma da Madeira (68.1%).

More information available at:
[Tourism activity – September 2020](#)
 (16 November 2020)

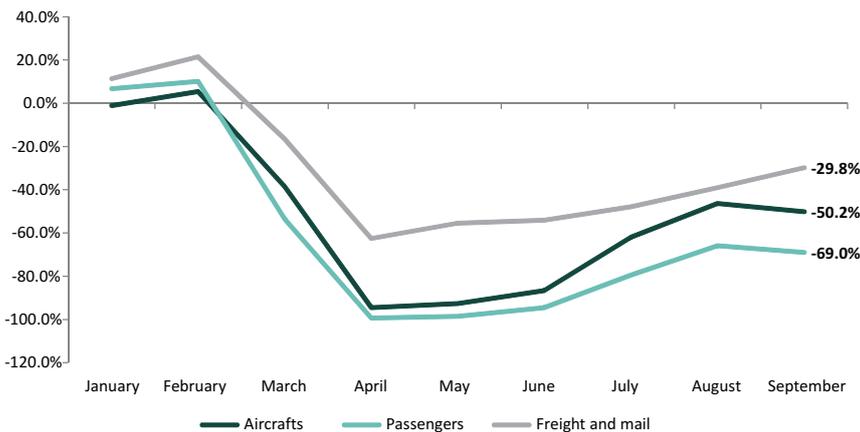
A reversal in the recovery trend in the movement of passengers

In September 2020, in year-on-year terms, at the national airports:

- The movement of passengers, in a total of 1.9 million, including embarked, disembarked, and direct transits, decreased by 69.0% (-65.9% in August);
- Cargo and mail, at 12.4 thousand tonnes, declined by 29.8% (-39.0% in August);
- The number of landed commercial aircraft amounted to 10.8 thousand, decreasing by 50.2% (-46.4% in August).



Aircrafts landed, passengers and freight/mail movement, 2020
(year-on-year rate of change)



Considering the number of aircraft landed and the number of passengers disembarked daily between January and September 2020, compared with the same period of the previous year, the impact of the COVID-19 pandemic and the measures adopted at the airspace level from the beginning of the second fortnight of March became noticeable. Despite the recovery that occurred in July and August, in September there was a trend reversal, with daily reductions of more than 40% in the number of aircraft landed and 60% in the number of disembarked passengers.

When comparing the number of passengers in national airports in the period January to September 2020 with the same period of the previous year:

- The number of landed commercial aircraft (77.7 thousand) decreased by 55,9%;
- The number of passengers handled (15.3 million) declined by 67,3%;
 - » Lisboa airport handled 51.0% of total passengers (7.8 million) and recorded a 67.3% decline;
 - » Amongst the three main national airports in terms of passenger traffic, Faro recorded the largest decrease (-75.4%);
- France was the main origin/destination of passengers handled in national airports: 1,661.7 thousand disembarked passengers and 1,168.8 thousand embarked passengers (-61.6% and -61.1% in year-on-year terms, in the same order);
- The United Kingdom, the second main country of origin/destination, had the largest reduction in the number of disembarked and embarked passengers: -78.9% and -72.9% respectively;
- The movement of cargo and mail (103.5 thousand tonnes) declined by 32.8%.

More information available at:
[Air transport flash statistics – September 2020](#)
(17 November 2020)

Industrial production prices decreased by 4.6% year-on-year

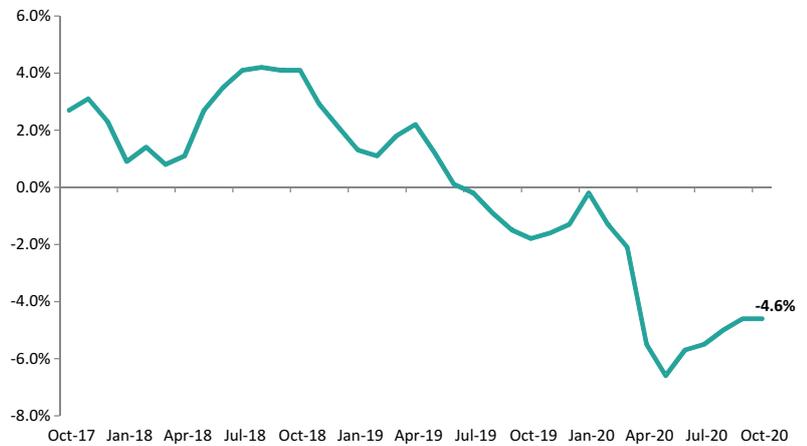
Year-on-year rate of change

In October, the industrial production prices decreased by 4.6% year-on-year (the same rate as in the previous month). *Energy* continued to be the most influential grouping to the total index at -18.5% (-17.6% in September).

Excluding *Energy*, the industrial production prices decreased by 1.0% (-1.3% in September).



Industrial Production Prices Index (year-on-year rate of change)

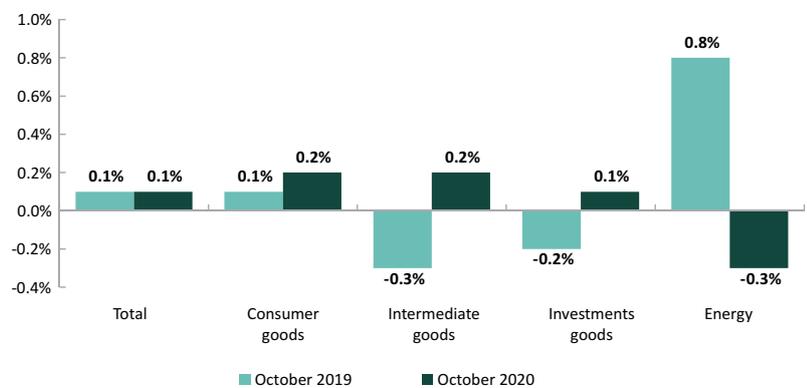


Month-on-month rate of change

In October 2020:

- The Industrial Production Price Index registered a month-on-month rate of change of +0.1% in September (the same as in the same period of 2019);
- The *Energy* index decreased by 0.3% (+0.8% in October 2019);
- *Manufacturing industries* increased by 0.2% (a null rate of change was recorded in October 2019).

Total Index and Major Industrial Groupings (month-on-month rate of change)



More information available at:
[Industrial production price index – October 2020](#)
 (18 November 2020)

Slower recovery of the economic activity

In October, in real terms, the Portuguese Gross Domestic Product (GDP) accounted for:

- A year-on-year rate of change of -5.7% in the 3rd quarter of 2020 (-16.4% in the previous quarter);
- An increase of 13.3% compared to the 2nd quarter of 2020 (-13.9% in the previous quarter).

The economic activity recovery started in May, slowed down in September and October.

In October, the economic climate indicator continued the recovery started in May, after the new series minimum recorded in April, but still below the pre-pandemic levels.

- The consumer confidence indicator increased in October and has remained relatively stable over the last four months, after the partial recovery in May and June, but it's still significantly below pre-pandemic levels. The outcome as seen last month resulted from:
 - » Positive contributions from perspectives on the future development of the country's economic situation and, to a lesser extent, from expectations on the financial situation of the household and opinions about the past evolution of the household's financial situation;
 - » The negative contribution of the expectations regarding major purchases;
- The manufacturing confidence indicator increased in October, after having interrupted the recovery between June and August in the previous month. The evolution of the indicator was due to:
 - » The positive contribution of expectations concerning production and opinions on the evolution of global demand;
 - » The negative contribution of opinions concerning the current stocks of finished products.

This month, the indicator increased significantly in the group of *Intermediate Goods*, increased slightly in the *Investment Goods* group, and decreased in the *Consumer Goods* group;

- The construction and public works confidence indicator recovered continuously between May and October. The recovery of the indicator in the last five months reflected the positive contributions of both components: the balance of opinions on order books and perspectives on employment.

In October, the only improvement in the indicator was recorded in the *Real Estate Development and Building Construction* division.

- The trade confidence indicator increased in October, returning to the upward trend observed between May and August. These developments reflected the positive contribution of all components: opinions on sales volumes, perspectives on business activity over the next three months, and opinions on the volume of stocks.

In October, the confidence indicator increased in subsectors *Wholesale trade* and *Retail trade*.

- The services confidence indicator increased between June and October, after having declined between February and May. The behavior of the indicator in October was the result of positive contributions from all components: opinions on the evolution of the orders book, opinions on enterprises' activity, and perspectives on the evolution of demand, more intense in the former case.

In October, the services confidence indicator increased in five of the eight sections, with emphasis on *Information and communication activities* and *Consulting, scientific, technical and similar activities*, which recorded the largest increases.

The economic activity indicator continued to recover in September but at a slower pace than that observed since May, after having reached the minimum of the series in April. By expenditure components, in September:

- The quantitative indicator of private consumption presented a less intense year-on-year decrease than the one recorded in August;
- The investment indicator also registered a slight year-on-year increase, continuing the recovery that started in May.

SYNTHESIS INE @ COVID-19

December . 02 . 2020

In October 2020, in year-on-year terms:

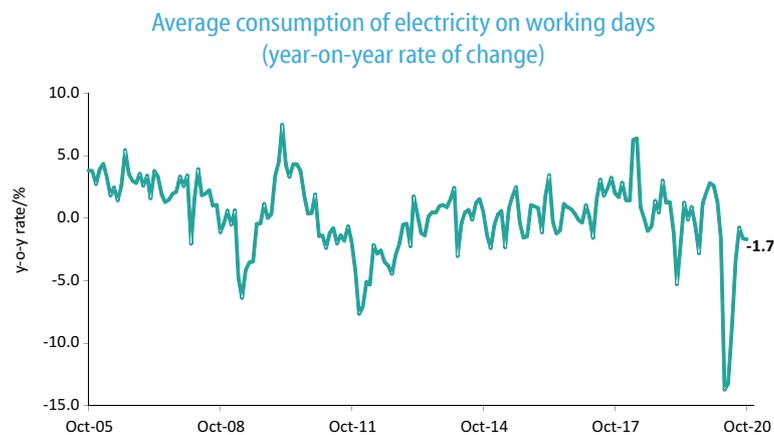
- The sales of passenger cars decreased by 12.6% (-0.1% in August and -9.4% in September).



- The overall amount of national withdrawals, payment of services, and purchases at automatic payment terminals carried out on the automatic teller machines of the Multibanco network registered a decrease of 6.3% (-8.1% in August and +4.5% in September).



- The average consumption of electricity on working days decreased by 1.7% (-0.7% in August and -1.6% in September).



- The consumption of road diesel and gasoline registered rates of change of -15.6% and -13.5% respectively (-5.8% and -6.6% in the previous month, in the same order).

In the Euro Area:

- Gross Domestic Product (GDP) in volume registered a year-on-year rate of change of -4.4% in the 3rd quarter of 2020 (-14.8% in the previous quarter) and a quarter-on-quarter rate of change of +12.6% (-11.8% in the 2nd quarter);
- In October, there was a slower recovery in the economic climate indicator and a decrease in the consumer confidence indicator;
- The prices of raw materials and crude oil presented month-on-month rates of change of -1.5% and -1.6%, respectively (+3.7% and -8.3 respectively, in September).

More information available at:
[Monthly economy survey – October 2020](#)
 (18 November 2020)

Internet and e-commerce users increased significantly The percentage of users for educational purposes more than doubled

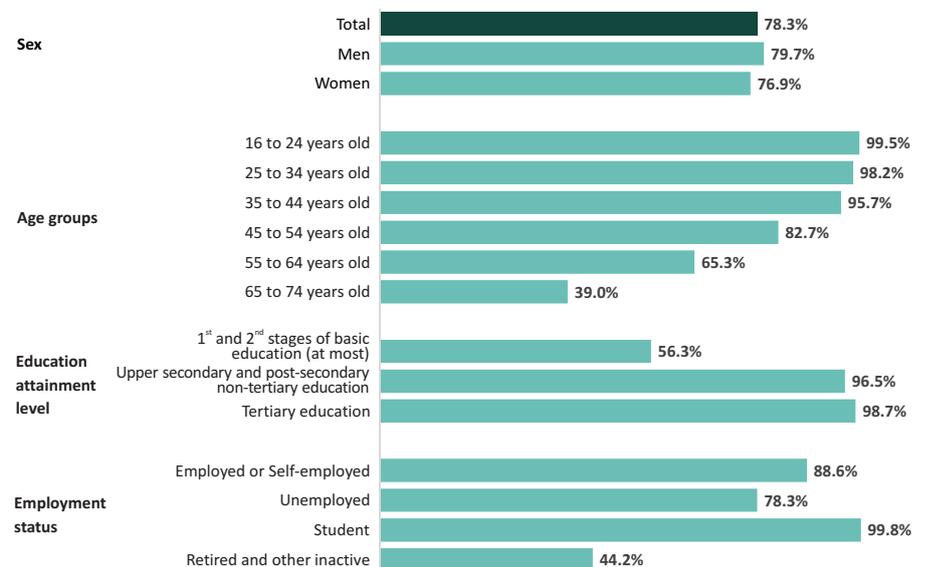
Answers to the survey were collected between the 21st of April and the 31st of August, i.e. in a context shaped by the COVID-19 pandemic.

Persons aged 16 to 74 years using the internet in the 3 months before the interview by some sociodemographic characteristics, Portugal, 2020

In 2020, 84.5% of households in Portugal have an internet connection at home and 81.7% use a broadband connection (+3.6 percentage points (p.p.) than in the previous year).

Almost 80% of the population aged 16 to 74 residing in Portugal used the internet in 2020 (in 2020, internet users represented slightly more than half of that population).

In 2019, despite this upward trend, the broadband penetration rate amongst Portuguese households was lower (-10 p.p.) than that of the European Union (EU-27).



In 2020, households with children up to 15 years old continue to record higher levels of Internet access (98.2%) and broadband access (96.8%) than the overall resident population.

The population aged 16 to 74 who used the internet in the 3 months before the interview did it mostly to communicate and access information.

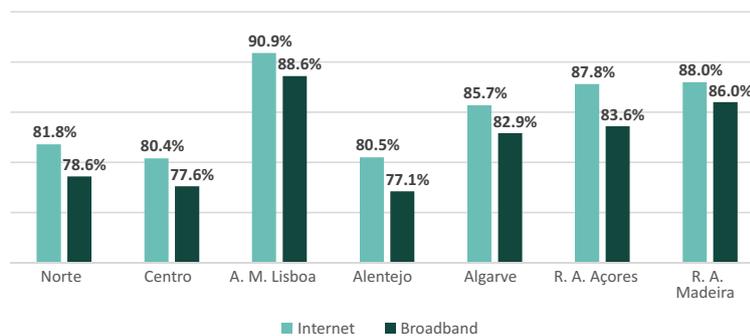
The activities related to learning purposes were the ones that showed the highest increase in internet use, in 2020:

- To communicate with teachers or colleagues through educational portals: from 14.5% in 2019 to 30.8 % in 2020;
- To attend online courses: from 7.7% in 2019 to 18.0% in 2020.

In 2020, the internet connection at home and broadband connection are more frequent in Área Metropolitana de Lisboa, Região Autónoma dos Açores, Região Autónoma da Madeira, and Algarve.



Households with internet connection and broadband connection at home, NUTS II, 2020



Despite being one of the regions with the lowest levels of internet and broadband accesses, Alentejo was also the region with the highest increase compared to 2019 (+6.6 p.p. internet accesses and +5.5 p.p. broadband connections).

In 2020, amongst those who have used the internet in the preceding 12 months, 56.9% reported having interacted with Public Administration authorities through a website or internet application to get information, downloading or printing official forms, or to complete and submit official forms online

The percentage of internet users between February and August 2020 (in the context of the pandemic) increased by 3.0 p.p. compared to the same period in 2019.

Among employed internet users, 31.1% worked from home; in Área Metropolitana de Lisboa, it reached 43.2%. For 29.6% of employed internet users, working from home was associated with the COVID-19 pandemic.

In 2020, 44.5% of people aged 16 to 74 placed orders by using the internet in the 12 months preceding the interview and 35.2% in the 3 months preceding the interview.

In 2020, the percentage of e-commerce users recorded the largest increase in the series started in 2002: +7 p.p. than in 2019.

Despite this increase, Portugal remains below the EU average in the use of the internet for shopping: in 2019, 49% of the European population (EU-27) responding to the survey had placed orders in the 3 months preceding the interview.

SYNTHESIS INE @ COVID-19

December . 02 . 2020

The amount of orders through e-commerce has increased significantly:

- The group of users that have placed between 3 to 5 orders increased by 4.0 p.p.;
- Those that placed between 6 to 10 orders increased by 9.5 p.p.;
- Those that placed more than 10 orders increased by 6.9 p.p.

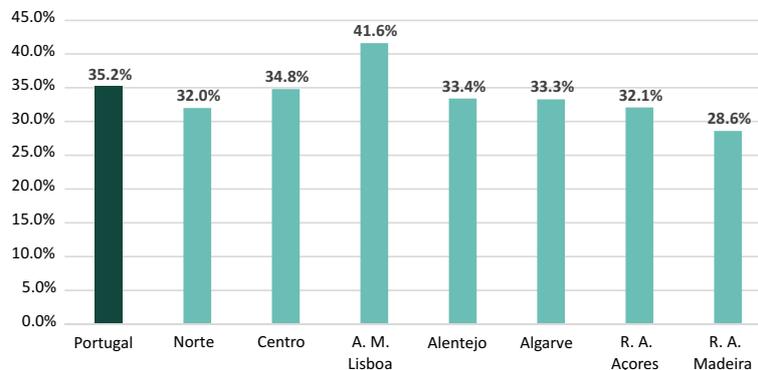
The value paid for each order also increased:

- 15.7 p.p. in orders that cost between €100 to €499;
- 8.0 p.p. in orders worth €500 and over.



Área Metropolitana de Lisboa is the only region where the percentage of people using e-commerce in the 3 months preceding the interview (41.6%) exceeds the average for the whole country (35.2%).

Persons aged 16 to 74 years using the internet in the 3 months prior to the interview, Portugal, EU-27 and EU-28, 2010-2020



More information available at:

[Information and knowledge society – 2020 household survey](#)
(20 November 2020)

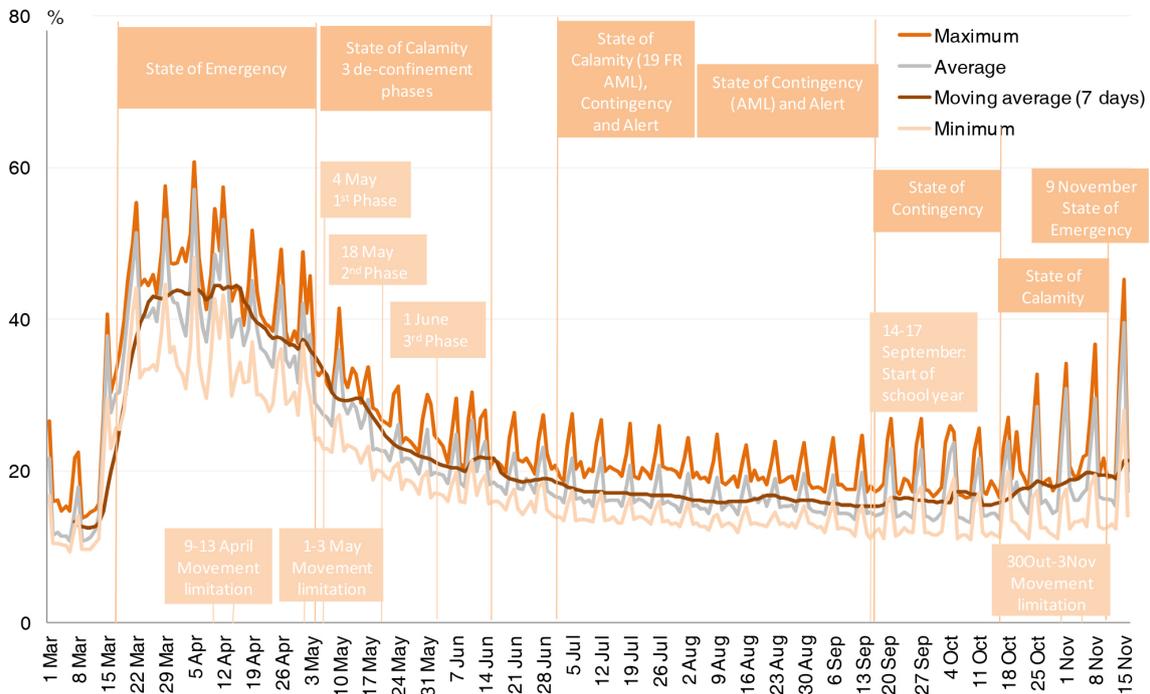
Context indicators for the COVID-19 pandemic in Portugal

Using data from Facebook’s “Data for Good” initiative, it is possible to obtain information on population mobility from a regional perspective in the context of the COVID-19 pandemic. The results have highlighted that:

- In the first State of Emergency, it was confirmed a decrease in population mobility, with an increase following the implementation of the de-confinement measures. Recently, following the declaration of a new State of Calamity on 15 October, there has been a further overall reduction in average levels of mobility, which was accentuated by the declaration of a new State of Emergency on 9 November;



Proportion of the population “staying put” between 1 March and 16 November – minimum, average and maximum values of NUTS 3 sub-regions

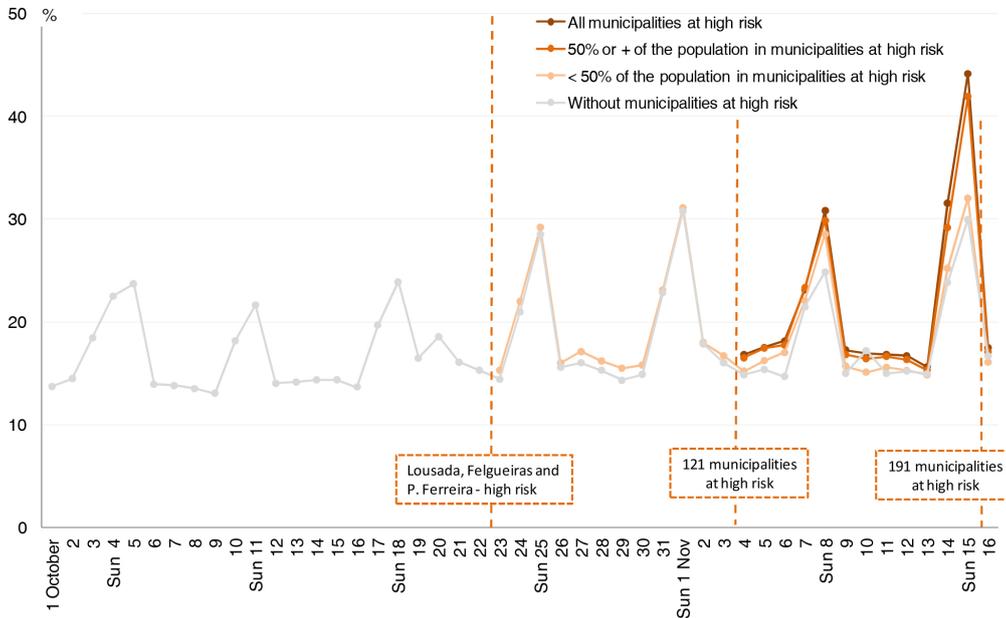


Note: The dates marked on the graph axis correspond to Sundays.

SYNTHESIS INE @ COVID-19

December . 02 . 2020

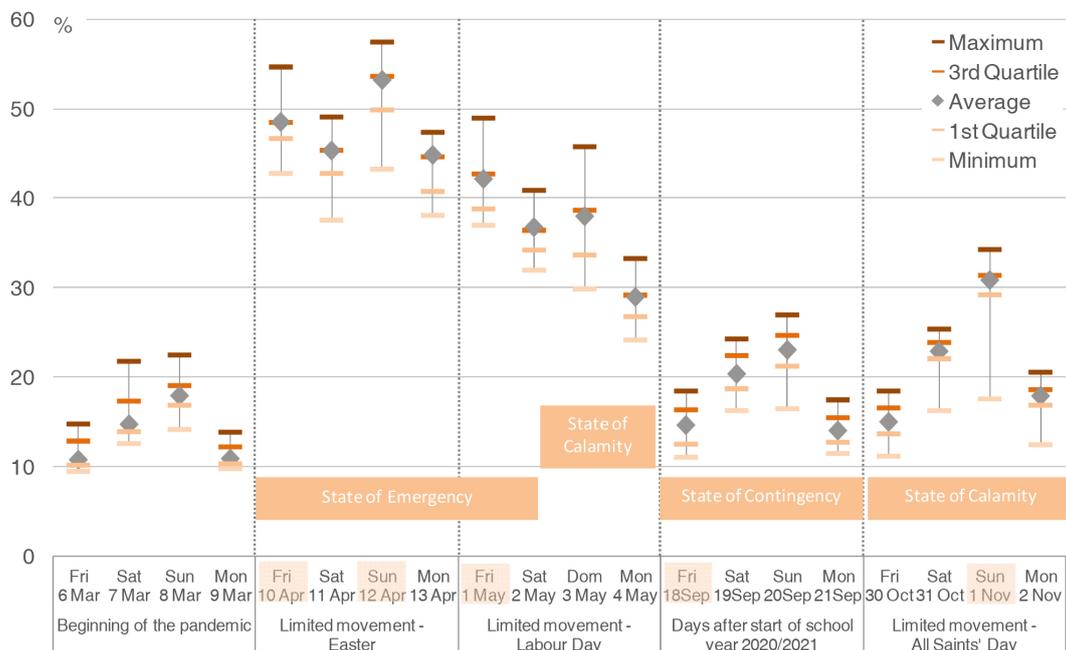
Proportion of the population “staying put” between 1 October and 16 November by NUTS 3 classification category based on the proportion of population living in high-risk municipalities



- All the NUTS 3 with 50% or more of the population living in municipalities at high risk of COVID-19 had, overall, lower levels of mobility than the other territories. Since 4 November - the date on which 121 high risk municipalities were identified - the set of NUTS 3 with all municipalities at high risk had the lowest levels of mobility on a daily basis. On the other hand, all NUTS 3 without municipalities at high risk tended to have the highest levels of mobility;

- On days with restricted movement between municipalities - Easter, Labour Day and All Saints' Day - there is a tendency for lower levels of mobility. This trend is particularly evident when comparing the days with mobility restrictions during Easter and Labour Day - when the country was also in a State of Emergency - with the same days in the beginning of March and the days after the start of the 2020/2021 school year.

Proportion of population “staying put” - position measures based on the NUTS 3 sub-regions - for Fridays, Saturdays, Sundays and Mondays associated to the periods of limited movement between municipalities and to two other reference periods in the context of the COVID-19 pandemic



Technical note

The mobility data from Facebook's "[Data for Good](#)" Initiative correspond to location updates collected from mobile devices of Facebook application users that have the "location history" option turned on. Only location accuracy (GPS) data of less than 200 meters is considered and if a user has multiple locations resulting from more than one associated mobile device, Facebook only considers the data with the highest location accuracy.

Obtaining results for the NUTS 3 level implies a minimum of 300 unique users per sub-region. The proportion of the population "staying put" is measured by the number of Facebook users associated with a single 600mx600m reference grid during 8 am and 8 pm on day x, requiring at least three occurrences during that time period. The reference grid, as a "residence" proxy, is measured daily based on the largest number of locations observed between 8 pm and midnight on day x-1 and between 0 am and 8 am on day x, requiring at least three occurrences during that time period. The information associated with the 600mx600m grids is allocated to the respective NUTS 3 sub-region. Since a grid cell can intercept more than one sub-region, 9 sample points are generated in each grid, assigning 1/9 of the grid population to each point in the sample.

The average figures presented for the total of Portugal and by NUTS 3 classification category according to the proportion of the population living in municipalities at high risk were calculated on the basis of the population weighted average (Statistics Portugal, Annual Estimates of Resident Population, 2019) in the respective NUTS 3 sub-region.

Facebook's "Data for Good" initiative aims to provide data for research on humanitarian issues and has allowed results to be published in scientific articles particularly in the United States. Obviously, Statistics Portugal's use of this data source in the Statslab domain is not motivated by any publicity motive, but by the public interest of the information. Statistics Portugal thanks researcher Miguel Godinho Matos¹ for his support in the analytical preparation of this information.

The edition of the press release "Indicators of demographic context and territorial expression of the COVID-19 pandemic in Portugal", every two weeks, has been benefiting from the information released weekly by the Directorate-General of Health (DGS) by municipality. The interruption in the weekly dissemination of information by municipality by DGS, between 19 October and 16 November, compromised the dissemination of the Statistics Portugal press release on 6 November.

The dissemination of information by municipality by DGS on 16 November was followed by a note identifying changes in the scope of the information provided by municipality: confirmed cases of SARS-CoV-2/COVID-19 infection notified in the National Epidemiological Surveillance System (SINAVE) began to consider, in addition to clinical notifications, laboratory notifications. The reference metric for the information by municipality has also changed: the *Number (total) of confirmed cases* is no longer available and the *14-day Cumulative Incidence* of Infection by SARS-CoV-2/COVID-19, obtained by the quotient of the number of new cases confirmed in the previous 14 days and the resident population estimated by INE for 2019, expressed per 100,000 inhabitants, is now disseminated. The note presented by the DGS does not mention the periodicity of the information availability, which was weekly, until the results released by the DGS on 19 October. The pattern of information availability has also changed from *1 day after the reference date of the information* to *6 days after the reference date*. The reference date of the last information published by DGS corresponds to a Tuesday when it was Sunday (last day of the standardised week used by Eurostat: ISO 8601). These changes do not allow Statistics Portugal, at least for the time being, to resume the usual analysis "The expression of the pandemic in municipalities".

For reference purposes, the data file attached to this press release shows a table with the 14-day cumulative incidence data (28/10/2020 to 10/11/2020) by municipality, as released by DGS on 16 November, and additionally the same metric for NUTS 3 sub-regions and the Number of new confirmed cases (28/10/2020 to 10/11/2020) by municipality and NUTS 3, estimated based on the data by municipality released by DGS and Statistics Portugal's Annual Estimates of Resident Population (2019).

¹ Associate Professor at Católica Lisbon School of Business & Economics and visiting research scholar at the Carnegie Mellon University.

Statistics Portugal started on 3 April 2020 the release of the “Statistics Portugal@COVID-19 Synthesis” series of highlights, aiming to provide a summary aggregation of some of the most relevant official statistical results released each week.

These reports are intended to facilitate the access to data which allow monitoring of the social and economic impact of the COVID-19 pandemic by decision-makers from public and private entities as well as the general public.

Press releases between 23-11-2020 and 27-11-2020:

Press Releases	Reference period	Release date
Information and knowledge society Business survey	2020	23 November 2020
Interest rates implied in housing loans	October 2020	23 November 2020
Globalization Statistics - Foreign Affiliates Statistics	2019	24 November 2020
Business and consumer surveys	November 2020	27 November 2020
Business turnover, employment, wage and hours worked index in retail trade	October 2020	27 November 2020
Survey on bank evaluation on housing	October 2020	27 November 2020