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SYNTHESIS INE @ COVID-19

December . 23 . 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:

- Consumer price index – November 2020, published on December 14;

- Construction: building permits and completed buildings – 3rd quarter of 2020, published on December 14;

- Tourism activity – October 2020, published on December 17;

- Air transport flash statistics – October 2020, published on December 18;

- Context indicators for the COVID-19 pandemic in Portugal, published on December 18.

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

In November, the CPI rate of change has decreased year-on-year

In November 2020, the Consumer Price Index (CPI) fell by -0.2% compared with the same month in 2019 (-0.1 percentage points (p.p.) compared to the previous month).

In November 2020, there were also the following year-on-year rates of change:
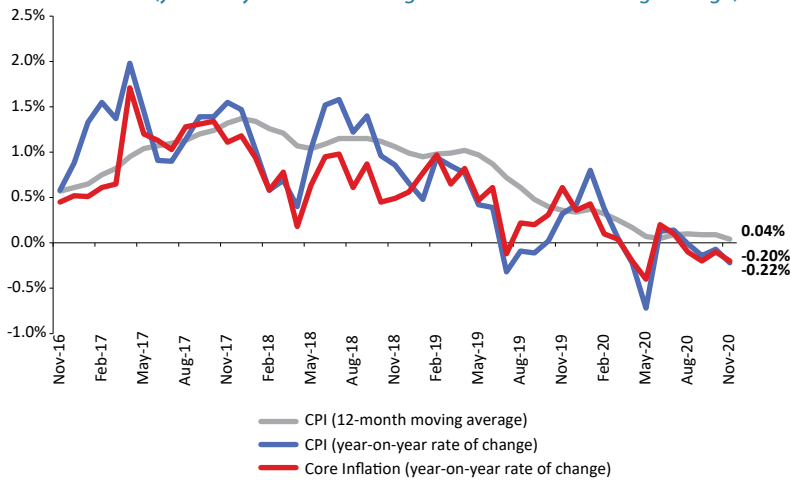
- *Unprocessed food* index: 3.8% (-0.7 p.p. vis-à-vis the previous month);

- Index for *energy*: -6.0% (equal change in the previous month);

- Core inflation indicator (total index excluding *unprocessed food* and *energy*): -0.2% (-0.1 p.p. than in the previous month).

Consumer price and core inflation indices
(year-on-year rate of change and 12-month moving average)

0.04%
-0.20%
-0.22%

Legend:
- CPI (12-month moving average)
- CPI (year-on-year rate of change)
- Core Inflation (year-on-year rate of change)

Compared to the previous month, increases in the year-on-year rates of change of the following classes are noteworthy:

- *Health*: 2.3% (1.4% in October);

- *Restaurants and hotels*: 0.5% (-0.4% in October);

- *Alcoholic beverages and tobacco*: 0.5% (-0.2% in October).

Conversely, the year-on-year rates of change of the following classes have decreased:

- *Leisure, recreation and culture*: -1.3% (-0.3% in October);

- *Clothing and shoes*: -3.7% (-2.9% in October).
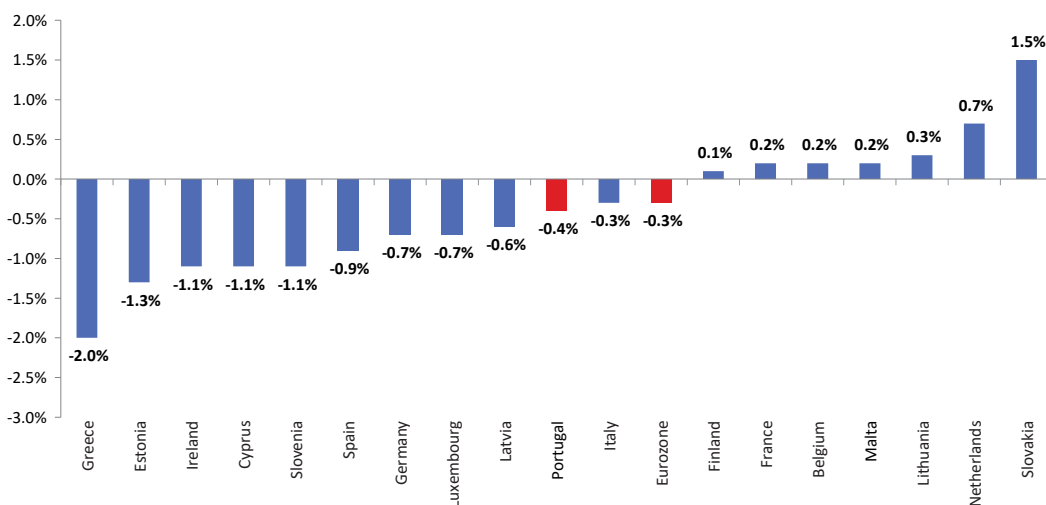
Month-on-month rate of change

In November 2020, the CPI recorded a month-on-month rate of change of -0.3% (0.1% in the previous month and -0.1% in November 2019). Excluding unprocessed food and energy, the change in the CPI was also -0.3% (0.1% in the previous month and -0.2% in November 2019).

Harmonised index of consumer prices

In November, the Harmonised Index of Consumer Prices (HICP) - the most appropriate inflation indicator for comparisons between the different countries of the European Union, and in particular in the Euro area - recorded a year-on-year rate of change of -0.4% in Portugal (+2 p.p. than in the previous month).

According to the information available for November 2020, concerning Eurostat's estimate, the year-on-year rate of change in the HICP in Portugal was 0.1 p.p. below that of the Euro area (in October 2020, this difference had been 0.3 p.p.).

Harmonised Index of Consumer Prices
(year-on-year rate of change in the Eurozone Countries)

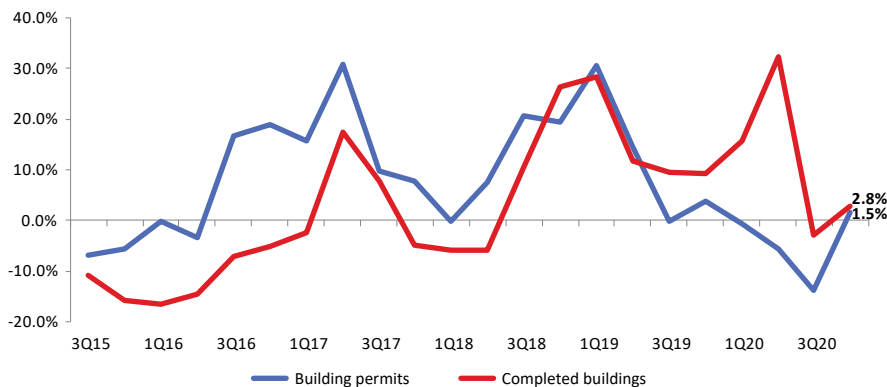| Country	Value
Greece	-2.0%
Estonia	-1.3%
Ireland	-1.1%
Cyprus	-1.1%
Slovenia	-1.1%
Spain	-0.9%
Germany	-0.7%
Luxembourg	-0.7%
Latvia	-0.6%
Portugal	-0.4%
Italy	-0.3%
Eurozone	-0.3%
Finland	0.1%
France	0.2%
Belgium	0.2%
Malta	0.2%
Lithuania	0.3%
Netherlands	0.7%
Slovakia	1.5%

More information available at:
Consumer price index – November 2020
(14 December 2020)

Building permits and completed buildings increased by 2.8% and 1.5%, respectively

In the 3rd quarter of 2020, in comparison with the same quarter a year earlier:

- Building permits (5.9 thousand) increased by 2.8% (-13.8% in the 2nd quarter of 2020);

- Building permits for new constructions increased by 5.0% (-24.8% in the previous quarter);

- Renovation permits decreased by 3.9% (-24.8% in the previous quarter);

- Completed buildings (3.7 thousand) declined by 1.5% (-2.8% in the previous quarter).

Permits and completed buildings
(quarterly year-on-year change)

Comparing to the previous quarter, the following variations were recorded:

- Building permits: +17.1% (-16.4% in the 2nd quarter of 2020);

- Completed buildings: +9.0% (-21.9% in the 2nd quarter of 2020).

The number of licensed buildings showed a decreasing trend, in year-on-year terms, from February to May 2020. This trend accelerated from March to May, with the highest negative year-on-year rate of change in April (-25.7%). In June, July and August 2020, there were positive year-on-year changes of 9.3%, 4.5% and 7.7%, respectively. In September and October, the number of licensed buildings decreased again, more sharply in October (-13.4%).

Of the total licensed buildings in the 3rd quarter of 2020, 72.2% corresponded to new constructions; 78.0% of these new constructions were meant to become family housing.

Of the total completed buildings in this period, 80.0% corresponded to new constructions, from which 73.5% were intended to become family housing.

More information available at:
Construction: building permits and completed buildings – 3rd quarter of 2020
(14 December 2020)

Tourist activity with more intense reductions in October
Algarve kept the increase in overnight stays of residents

The tourist accommodation sector registered 1.0 million guests and 2.3 million overnight stays in October 2020, corresponding to year-on-year rates of change of -59.7% and -63.3% respectively (-53.0% and -53.4% in September 2020, in the same order).

In October, compared to the same month in 2019, overnight stays of residents declined by 21.7% (-8.6% in September) and those of non-residents decreased by 76.4% (-71.8% in the previous month).

By type of accommodation, the outcome concerning overnight stays in October 2020, year-on-year, was as follows:

- Hotel establishments (with 79.1% of the total overnight stays): -65.3%;

- Local accommodation establishments (share of 16.1% of total overnight stays): -58.2%;

   » Hostels (accounted for 17.7% of overnight stays in local accommodation): -67,1%;

- Rural/lodging tourism (4.8% of total overnight stays): -24.6%.

In the first ten months of 2020, there was a 61.5% decline in total overnight stays, as a result of year-on-year rates of change of -32.4% as regards residents and -73.8% concerning non-residents.
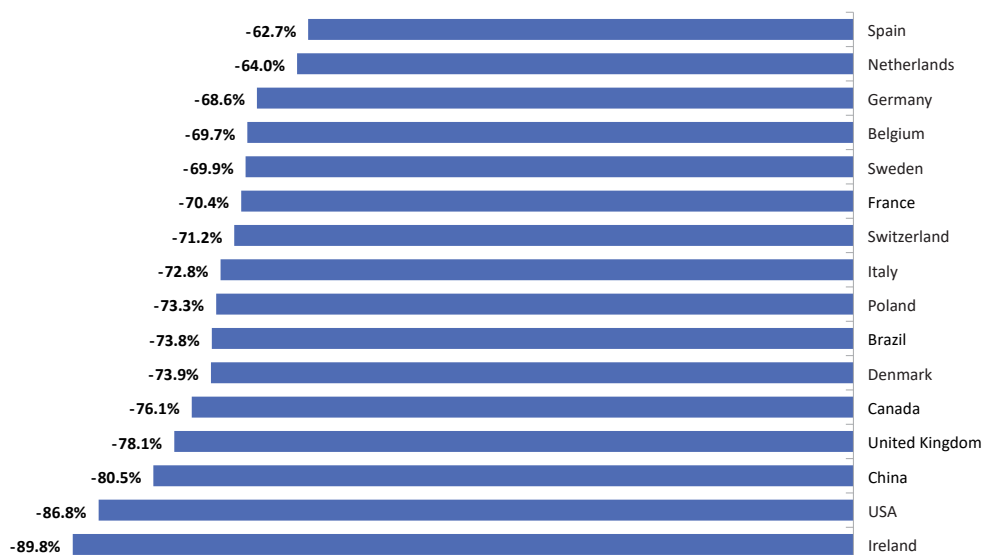
Overnight stays and Guests in October 2020

	Overnight stays		Guests	
	10^3	Year-on-year change	10^3	Year-on-year change
Total	2 330.6	-63.3%	1 006.8	-59.7%
Residents	1 191.0	-21.7%	641.9	-24.5%
Non-residentes	1 139.6	-76.4%	364.9	-77.9%

In October, 32.1% of tourist accommodation establishments were closed or had no movement of guests (25.9% in September).

In the first ten months of the year, there were significant decreases (over 60%) in overnight stays spent by tourists from the 16 main inbound countries, particularly Ireland and the USA.

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

Country	Rate
Spain	-62.7%
Netherlands	-64.0%
Germany	-68.6%
Belgium	-69.7%
Sweden	-69.9%
France	-70.4%
Switzerland	-71.2%
Italy	-72.8%
Poland	-73.3%
Brazil	-73.8%
Denmark	-73.9%
Canada	-76.1%
United Kingdom	-78.1%
China	-80.5%
USA	-86.8%
Ireland	-89.8%

In October 2020, tourists from these 16 countries accounted for 91.9% of overnight stays of non-residents in tourist accommodation establishments:

- The largest reductions in the number of arriving tourists were from:

  » USA: -95.7%;

  » China: -95.7%;

  » Canada: -94.9%;

  » Ireland: -92.6%.

- The smallest decreases were from:

  » Netherlands: -44.3%;
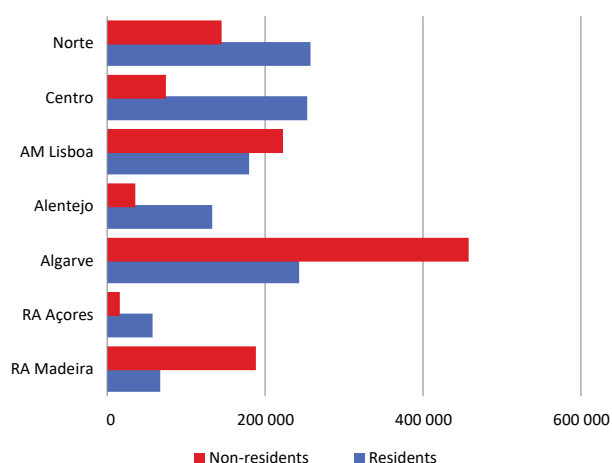
  » Spain: -50.4%;

  » France: -58.1%.

All NUTS II regions in Portugal registered decreases in overnight stays in October 2020:

- The smallest decreases occurred in Alentejo (-29.4%) and Centro (-49.3%);

- The largest reductions were in Área Metropolitana de Lisboa (-76.7%), Algarve (-63.7%) and Região Autónoma dos Açores (-61.4%).

In the same month:

- Algarve concentrated 30.1% of overnight stays, followed by Norte, Área Metropolitana de Lisboa (17.3% in both) and Centro (14.3%);

- Algarve was the only region with an increase in overnight stays of residents (+3.7%).

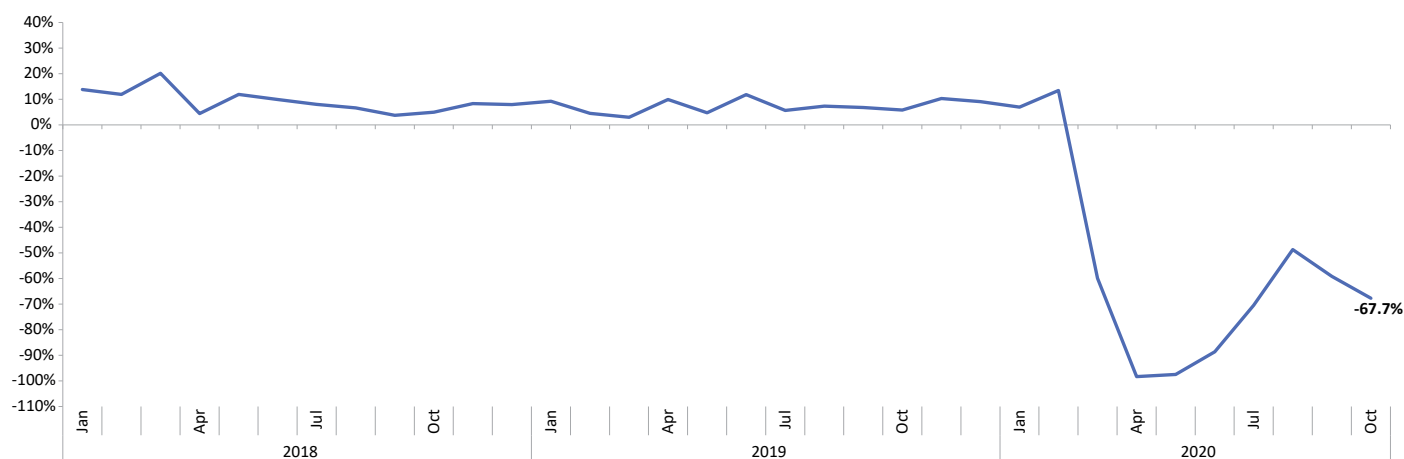## Overnight stays in tourist accommodation establishments, by region NUTS II - October 2020

In the first ten months of the year as a whole, the regions with the smallest decreases in the number of overnight stays were Alentejo (-35.7%), Centro (-50.5%), and Norte (-56.8%).

In October 2020, in tourist accommodation establishments:

- The average stay of guests (2.31 nights) decreased by 9.0% (-0.9% in September);
- Total revenue amounted to EUR 126.2 million, a year-on-year rate of change of -67.7% (-59.1% in September).

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

All regions registered significant decreases in total revenue in October, more so Área Metropolitana de Lisboa (-82.9%), Norte (-65.9%), and Região Autónoma dos Açores (-65.5%).

More information available at:
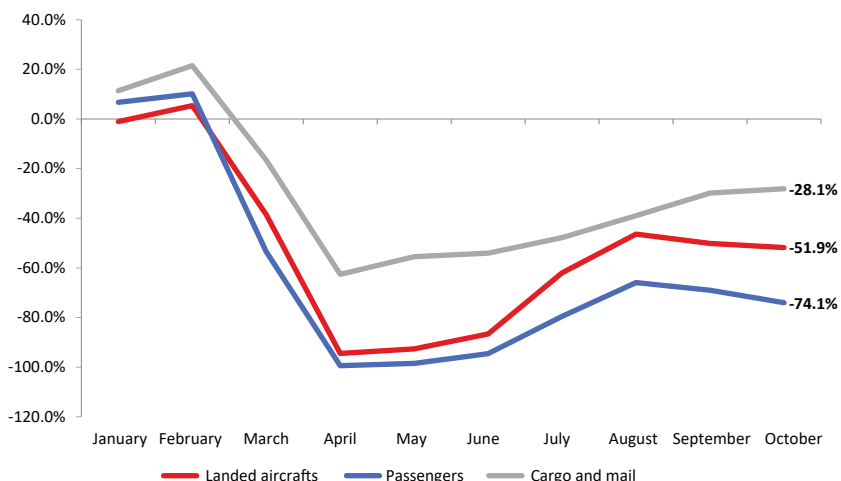Tourism activity – October 2020
(17 December 2020)

The downward trend in passenger movement has deepened in October

At national airports, in October 2020, on a year-on-year basis:

- Passenger movement, which was 1.4 million considering all passengers embarked, disembarked, and direct transits, decreased by 74.1% (-69.0% in September);

- Cargo and mail handled (14.2 thousand tonnes) decreased by 28.1% (-29.8% in September);

- The number of landed commercial flights amounted to 9.7 thousand, decreasing by 51.9% (-50.2% in September).

Landed aircraft, passengers movement and cargo/mail, 2020
(Year-on-year rate of change)

Legend: Landed aircrafts — Passengers — Cargo and mail

Looking at the number of aircraft landed and the number of passengers disembarked daily between January and October 2020, and comparing it 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 half of March is visible. Despite the recovery in July and August, there was a reversal of the trend in September and a further worsening in October, with daily reductions of more than 45% in the number of aircraft landed and 65% in the number of passengers disembarked.

Considering the movement at national airports in the period from January to October 2020, compared with the same period of the previous year:

- The number of landed commercial aircraft (87.4 thousand) decreased by 55.5%;

- The number of passengers handled (16.7 million) decreased by 68.0%;

  » Lisbon airport handled 50.3% of total passengers (8.4 million) and registered a decrease of 68.5%;

  » Among the three airports with the highest passenger traffic, Faro airport was the one with the largest decrease (-75.2%);

- France was the main country of origin and destination of passengers handled at national airports: 1,295.8 thousand passengers disembarked and 1,301.0 thousand embarked (-61.5% and -61.0% in year-on-year terms, in the same order);

- The United Kingdom, the second-largest country of origin and destination, had the largest reduction in the number of passengers disembarked and embarked: -74.9% and -74.1% respectively;

- The movement of cargo and mail (117.7 thousand tonnes) decreased by 314%.
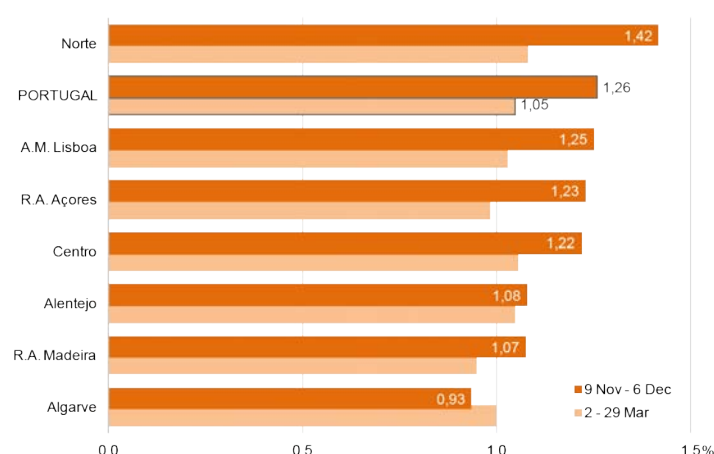
More information available at:
Air transport flash statistics - October 2020
(18 December 2020)

COVID-19: a territorial view on demographic context and territorial expression of the pandemic

The expression of the pandemic on national territory continues to be characterised by a high degree of heterogeneity. Some of the results obtained in this context:
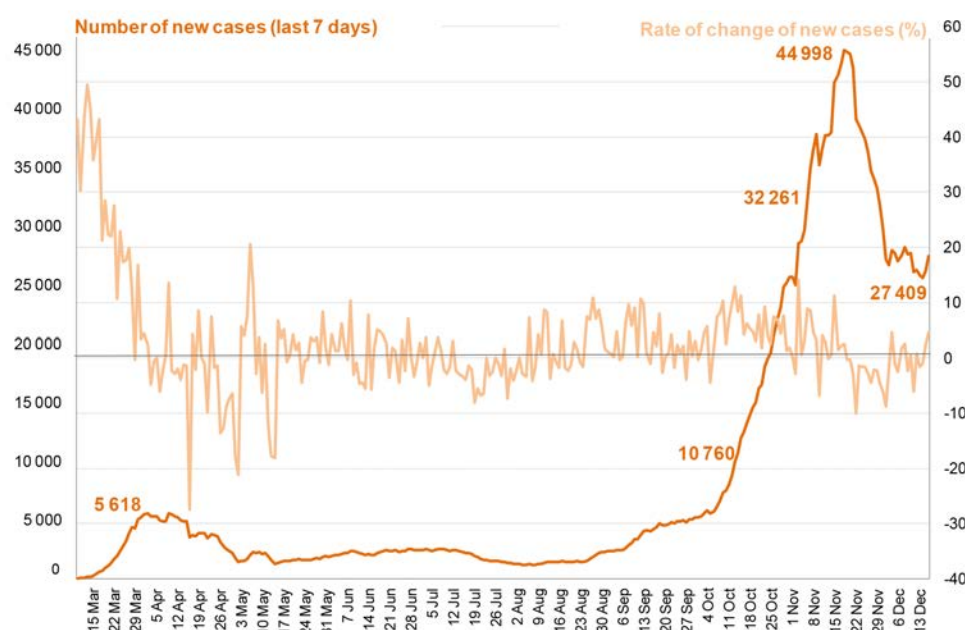
- In the Norte region, the number of deaths between 9 November and 6 December 2020 was 1.4 times higher than in the same period of reference (average for the same period from 2015 to 2019). This was the only NUTS 2 region to exceed the national average value (1.26);

Ratio between deaths in the last 4 weeks and deaths in the same reference period, Portugal and NUTS 2, weeks from 2 to 29 March to weeks and from 9 November and 6 December

- On 16 December, there were 27,409 new cases in Portugal in the last 7 days. Between 18 November and 3 December there was a progressive decrease in the number of new cases of COVID-19 (last 7 days), with slight recoveries after that date, but the number of new cases remained below 30 thousand;

Number of new confirmed cases (last 7 days) of infection by SARS-CoV-2/COVID-19 and respective rate of change, Portugal, per day (10/3/2020 to 16/12/2020)
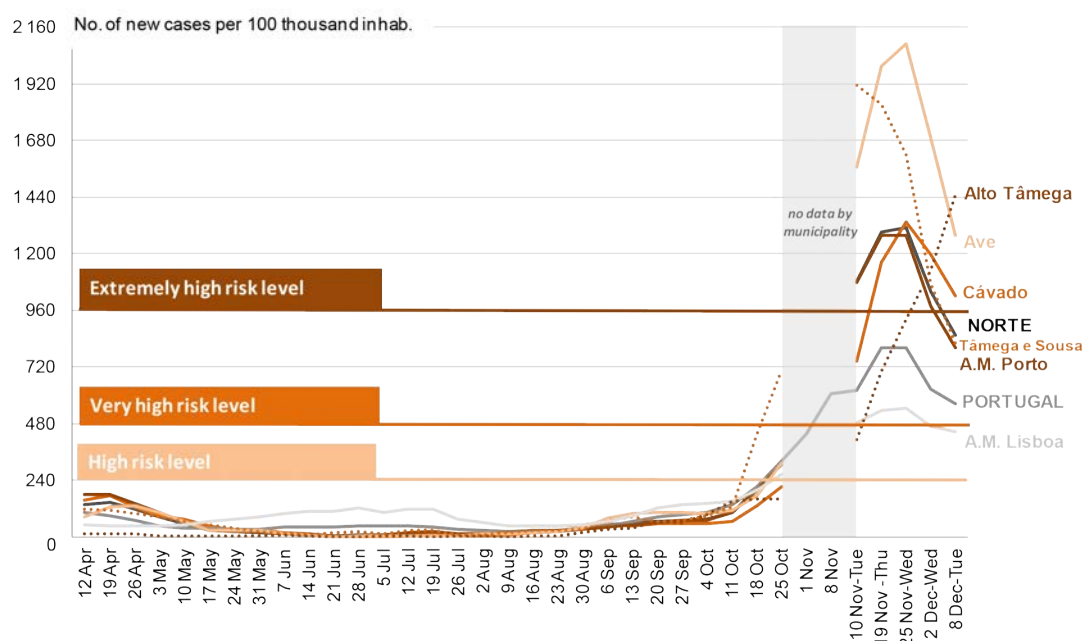

Note: The number of new cases includes the +4,375 confirmed cases resulting from the historical update released by the Directorate-General of Health in the COVID-19 Status Report made available on 16 November (data on the situation up to 15 November) with impact on the new cases in the last 7 days for the period 15-21 November. The dates marked on the graph axis correspond to Sundays.

- On December 8, the date of the last data update at the municipality level, the 14-day incidence rate of COVID-19 was 564 new cases per 100,000 inhabitants;

- The new cases registered in the last 14 days in the Norte region accounted for 53% of the total new cases in the country. Three sub-regions of this region - Alto Tâmega, Ave and Cávado - stood out for presenting more than 1,000 new cases per 100,000 inhabitants, although with distinct dynamics: Ave and Cávado registered a reduction in the number of new cases, while Alto Tâmega presented an exponential rise since November 10;

14-day cumulative incidence rate of SARS-CoV-2/COVID-19, Sundays - 12 April to 25 October; Tuesday - 10 November; Thursday - 19 November, Wednesday - 25 November, Wednesday - 2 December and Tuesday – 8 December, Portugal, Norte region and sub-regions of Alto Tâmega, Ave, Cávado, Tâmega e Sousa and metropolitan areas of Porto and Lisboa
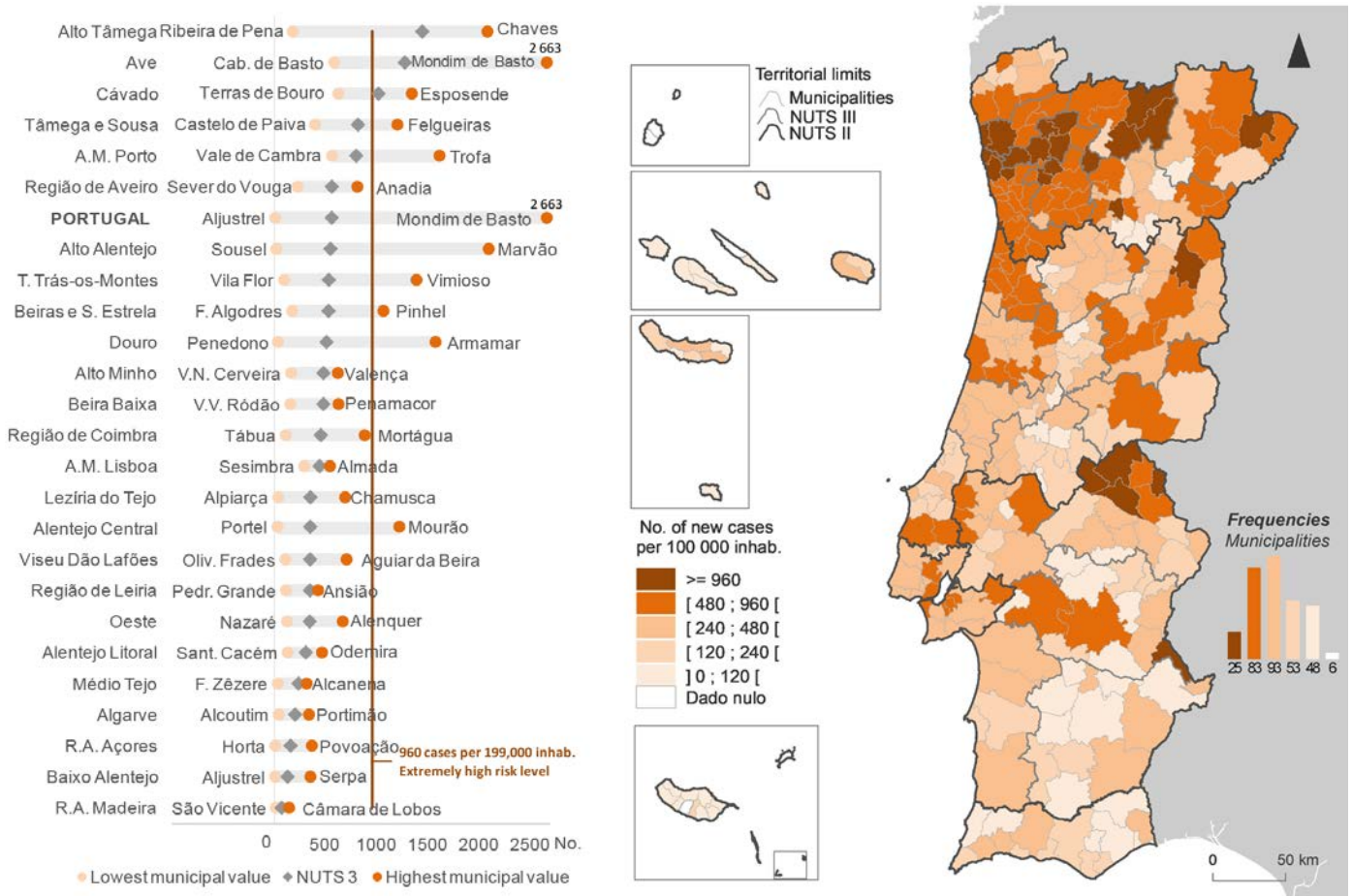

Note: The absence of values at the regional level on 1 and 8 November is due to the interruption in the dissemination of data at the municipality level in the COVID-19 Status reports. The dates marked on the graph axis correspond to Sundays until 8 November and then to the reference days associated with the 14-day cumulative incidence indicator that is now being released weekly by the Directorate-General of Health (see technical note at the end of the press release).

- On 8 December, 25 municipalities registered a number of new confirmed cases of COVID-19 (last 14 days) per 100,000 inhabitants above the threshold defined as extremely high risk (960 new cases per 100,000 inhabitants), 19 of which belonged to NUTS 2 Norte, representing 26% of the population living in this region;
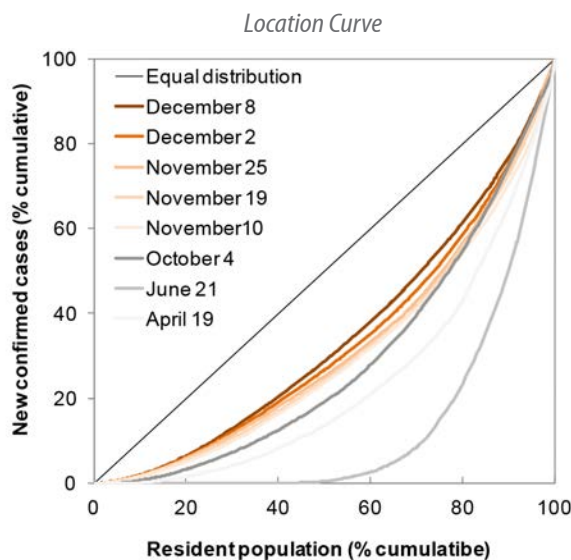
14-day cumulative incidence rate of infection by SARS-CoV-2/COVID-19 on 8 December, Portugal NUTS 3 and municipality

Note: In the graph, in NUTS 3 sub-regions with zero data status, the municipalities with the lowest value in the indicator are identified.

- The lowest level of territorial concentration of new COVID-19 cases (last 14 days) occurred on December 8 and the highest on June 21, considering the location coefficient calculated weekly since April 19. Until June 21, the trend was towards a greater concentration of new registered cases, which was subsequently followed by a reduction in concentration.

Territorial concentration of new confirmed cases of infection by SARS-CoV-2/COVID-19 (last 14 days), in relation to the resident population, based on the distribution by municipality.

Location Curve

Location Coefficient

Date	Location Coefficient
8 December - Tuesday	22.0
2 December - Wednesday	25.1
25 November – Wednesday	27.5
19 November – Thursday	28.7
10 November – Tuesday	28.9
25 October	28.4
18 October	30.4
11 October	31.3
4 October	32.2
6 September	35.1
9 August	44.9
12 July	51.8
21 June	61.6
17 May	39.8
19 April	40.1

(Sundays)

Note: For the calculation of the location coefficients zero cases were considered for the municipalities with no value in the Directorate-General of Health Status report (0 or< 3 cases).
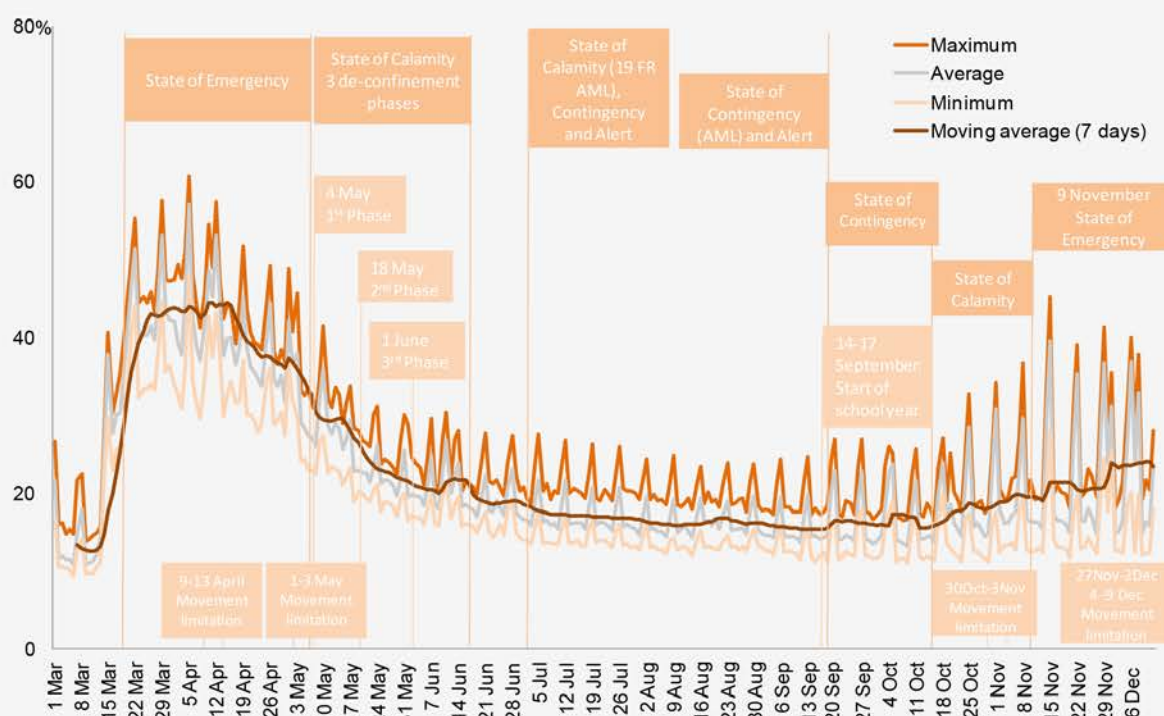
STATS lab

Population mobility indicators at regional level: an analysis based on information from Facebook's "Data for Good" Initiative

Taking advantage of Facebook's "Data for Good" initiative, the figure below shows the proportion of the population "staying put" between 1 March and 12 December, namely the minimum, average and maximum values calculated based on the NUTS 3 sub-regions. The proportion of population that "stayed put" is based on the number of Facebook users associated with a single reference grid of 600mx600m during 8 am and 8 pm on day x, requiring at least three occurrences during that time period. For a better contextualisation of the information, the figure includes the main key moments associated with the COVID-19 pandemic in Portugal.

It is possible to observe that on Sundays there is generally less mobility of the population than on other days of the week. It is also noteworthy that after the first confirmed cases of COVID-19 and following the declaration of the first State of Emergency, there is a decrease in the mobility of the population, followed by an increase in the levels of mobility after the implementation of the de-confinement measures, the first phase of which started on 4 May. More recently, following the declaration of a new State of Calamity on 15 October, the restriction of movement between municipalities declared between 30 October and 4 November and the declaration of a new State of Emergency on 9 November and its renewal on 24 November and 9 December, there has been a further overall reduction in the average levels of mobility.

Considering the moving average of the last 7 days, this recent reversal of the trend towards a reduction in mobility has been taking place since mid-October and is intensified following the restrictions of movement between municipalities associated with the public holidays of 1 and 8 December.

Proportion of the population "staying put" between 1 March and 12 December – minimum, average and maximum values of NUTS 3 sub-regions

Source: Facebook's "Data for Good" Initiative. Data provided by Carnegie Mellon University. Note: The dates marked on the graph axis correspond to Sundays.
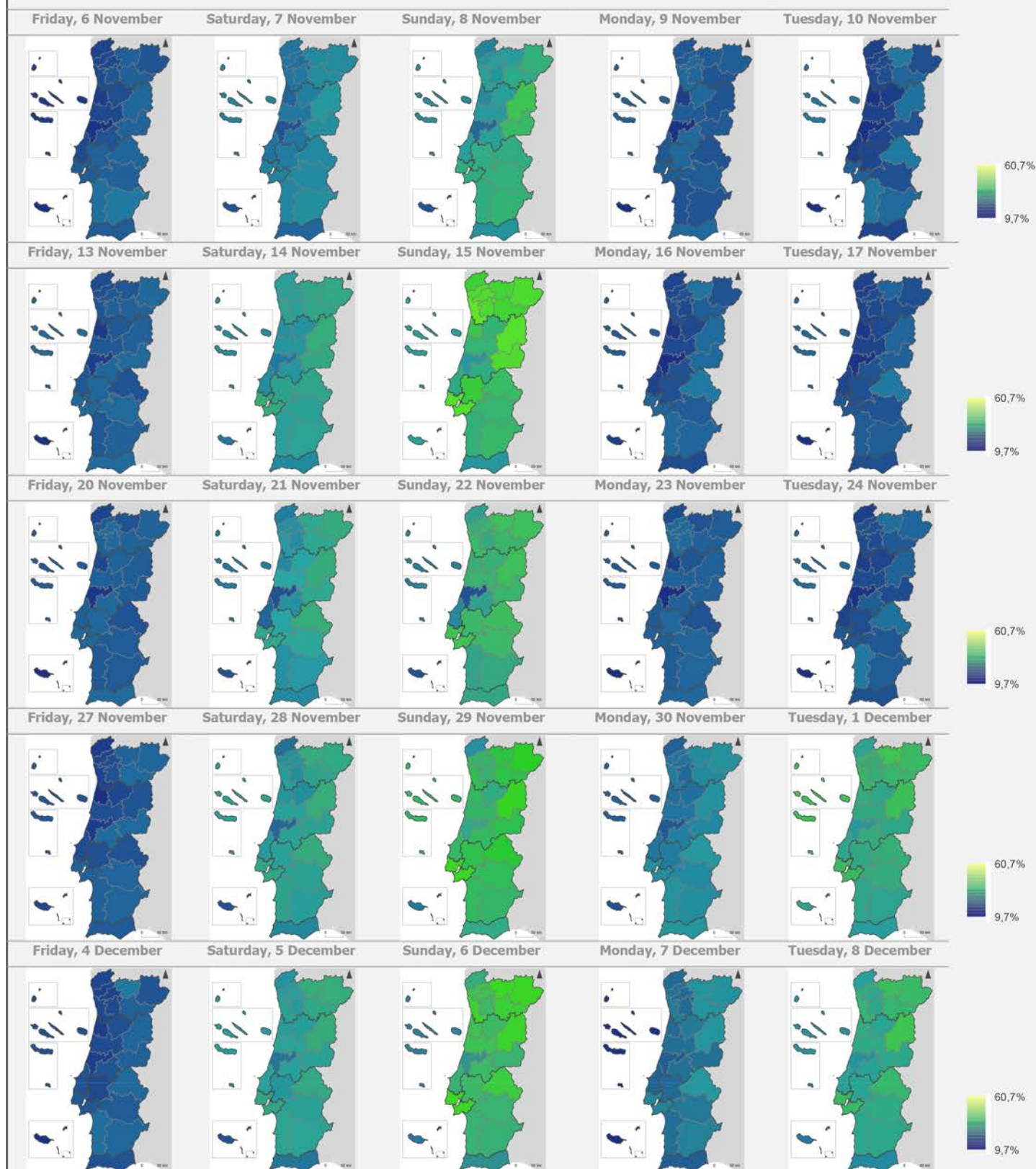
The following figure shows the population's mobility levels for five days of the week (Friday, Saturday, Sunday, Monday and Tuesday) from 6 November to 8 December, thus including the periods of limitation of movement between municipalities, decreed around the holidays of 1 and 8 December, including the recommendation to grant the day-off and the suspension of teaching activity on 30 November and 7 December. Overall, there are lower levels of mobility on Sundays, as well as on weekdays with restrictions of movement between municipalities and, in particular, on Tuesdays coinciding with the holidays of 1 and 8 December.

STATS lab

Proportion of the population "staying put" on Fridays, Saturdays, Sundays, Mondays and Tuesdays from 6 November to 8 December by NUTS 3

Friday, 6 November	Saturday, 7 November	Sunday, 8 November	Monday, 9 November	Tuesday, 10 November

60,7%
9,7%

Friday, 13 November	Saturday, 14 November	Sunday, 15 November	Monday, 16 November	Tuesday, 17 November

60,7%
9,7%

Friday, 20 November	Saturday, 21 November	Sunday, 22 November	Monday, 23 November	Tuesday, 24 November

60,7%
9,7%

Friday, 27 November	Saturday, 28 November	Sunday, 29 November	Monday, 30 November	Tuesday, 1 December

60,7%
9,7%

Friday, 4 December	Saturday, 5 December	Sunday, 6 December	Monday, 7 December	Tuesday, 8 December

60,7%
9,7%

Fonte: Iniciativa "Data for Good" do Facebook. Dados cedidos pela Carnegie Mellon University.

More information available at:
Context indicators for the COVID-19 pandemic in Portugal
(18 December 2020)

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 21-12-2020 and 25-12-2020:

Press Releases	Reference period	Release date
Environment statistics	2019	21 December 2020
Industrial production price index	November 2020	21 December 2020
Monthly Economic Survey	November 2020	21 December 2020
House Price Index	3rd Quarter 2020	22 December 2020
Interest rates implied in housing loans	November 2020	22 December 2020
Quarterly National Sector Accounts	3rd Quarter 2020	23 December 2020