



SYNTHESIS INE @ COVID-19

August . 13 . 2020

Statistics Portugal makes available the 19th weekly report of some of the most recent and relevant statistical findings released for monitoring the social and economic impact of the COVID-19 pandemic.

This report covers the press releases concerning:

- Tourism activity - Flash Estimate – June 2020, published on August 3;
- Employment statistics – 2nd quarter of 2020, published on August 5;
- Labour force survey ad hoc module – 2nd quarter of 2020, published on August 5;
- Gross monthly earnings per worker, published on August 6;
- New housing construction cost index – June de 2020, published on August 7;
- Production, employment, wages and hours worked indices in Construction – June 2020, published on August 7;
- International trade statistics – June 2020, published on August 7.

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

A slight recovery in tourist activity in June mostly due to residents

According to the flash estimate, in June 2020, the tourist accommodation sector should have registered 500.5 thousand guests and 1.1 million overnight stays, corresponding to year-on-year rates of change of -81.7% and -85.1%, respectively (-94.2% and -95.3% in May, in the same order).

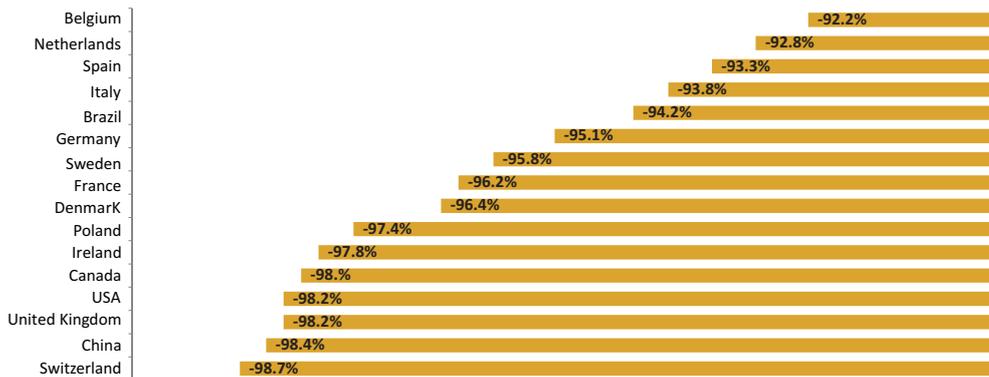


In June, in year-on-year terms:

- Overnight stays of residents would have been 869.6 thousand, -59.8% (-85.9% in May);
- Overnight stays of non-residents would have been 201.3 thousand, -96.0% (-98.4% in May);
- Resident guests would have been 420.4 thousand, -60.1% (-86.5% in May);
- Non-resident guests would have been 80.2 thousand, -95.2% (-98.3% in May).

In June, there were very significant decreases (over 92%), in year-on-year terms, in tourists from all the main inbound markets.

Overnight stays in tourist accommodation establishments by main countries of origin of tourists (year-on-year change)



In May, around 45.2% of the tourist accommodation establishments will have been closed or will have not registered any movement of guests.

Booking cancellations in most establishments

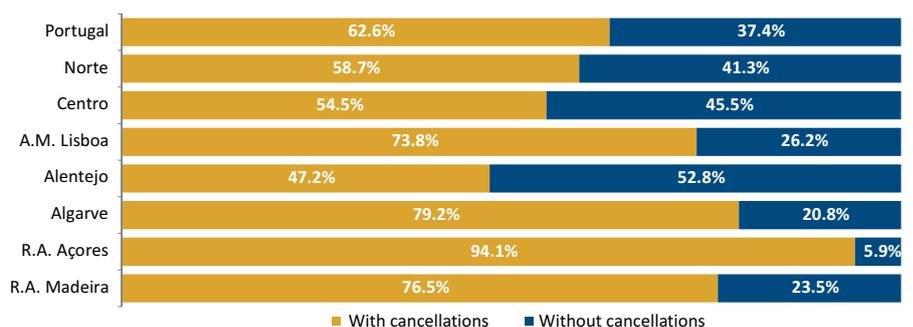
In Portugal, 62.6% of the 3,900 tourist accommodation establishments that responded to the survey reported that the pandemic led to the cancellation of bookings planned from June to October 2020 (these establishments represent 78.6% of the capacity of the respondent establishments).

The Região Autónoma dos Açores was the one with the highest share of establishments with reservations cancelled (94.1% of the establishments and 91.3% of the capacity offered).

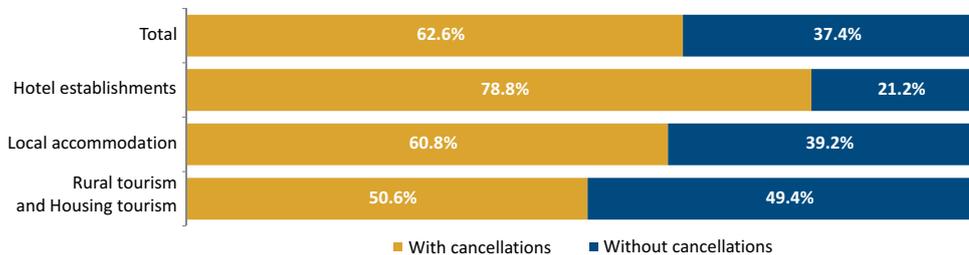
Alentejo was the region with the lowest number of reservations cancelled (47.2%).



Establishments with cancellation of bookings, by NUTS II regions



Establishments with cancellation of bookings by type of establishment

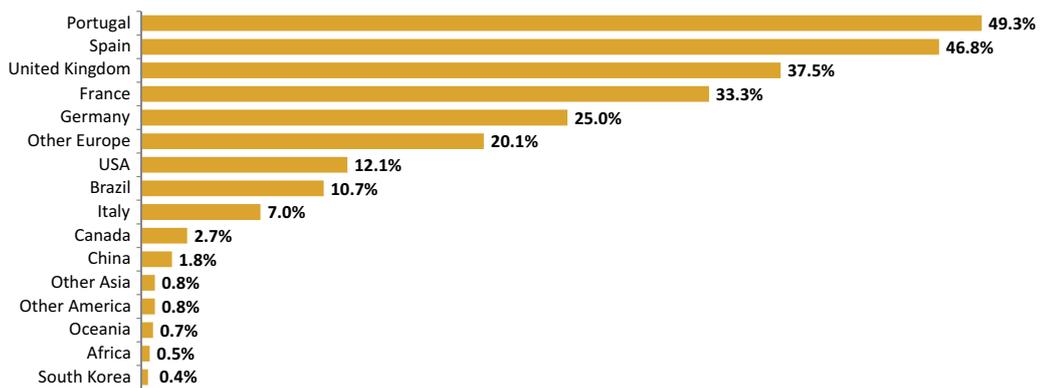


Cancellation of bookings, total or partial, in the months traditionally with greater demand



For 49.3% of tourist accommodation establishments, Portuguese tourists cancelled the most bookings, followed by the Spanish (46.8% of establishments), British (37.5%), French (33.3%), and German (25.0%).

Main markets with cancellation of bookings, by establishment (%)

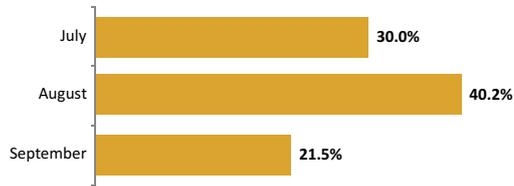


Tourists with the most cancellations, by type of accommodation:

- Hotels: Portuguese (58.2% of establishments), Spanish (56.5%) and British (42.9%);
- Local accommodation establishments: Spanish (45.9% of establishments), British (38.2%) and Portuguese (38.1%);
- Rural/lodging establishments: Portuguese (56.8% of establishments).

Most of the establishments that were planning to be in operation from June to October were expecting to register occupancy rates below 50% in each of these months.

Expected occupancy rates above 50% (respondent establishments)



Concerning the prices to be charged during these months compared to the previous year:

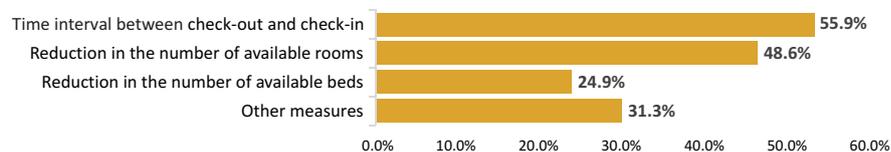
- Most establishments (57%) don't expect to change their prices;
- About one-third of the establishments (34.9%) admit to reducing prices;
- About 8% are considering the possibility of increasing their prices.

In this period, the evolution of prices in the different types of accommodation should be the following:

- Hotels:
 - 45.4% of establishments will keep their prices unchanged;
 - 44.4% will lower their prices;
- Local accommodation establishments: 52.8% don't expect to change their prices;
- Rural/lodging establishments: 73.1% don't expect to change their prices.

49.1% of the establishments reported that their offer capacity will decrease as a result of the implementation of the mandatory social distancing, hygiene, and cleaning measures.

Main measures with an impact on the reducing of the capacity on offer, by establishment (%)



There are different expectations regarding the impact of these measures on the reduction of offer capacity, concerning the different types of accommodation establishments:

- Hotels: 57.5% of the establishments;
- Local accommodation establishments: 46.7%;
- Rural/lodging establishments: 45.1%.

More information available at:

[Tourism activity, flash estimate – June 2020](#)
(3 August 2020)



The number of hours worked in the 2nd quarter of 2020 decreased by 26.1% compared to the same quarter of 2019

In the 2nd quarter of 2020, as a consequence of the COVID-19 pandemic, the labour market accounted for:

- A significant increase in the inactivity rate to 43.7% (+2.3 p.p. than in the previous quarter and +2.9 p.p. compared to the same period of 2019), mostly due to the increase in the number of the inactive people available to work but not seeking a job;
- A quite significant reduction in the employed population: -2.8% (-134.7 thousand people) than in the previous quarter; -3.8% (-185.5 thousand people) compared to the same quarter of 2019;
- Significant changes in the work organization, namely the unprecedented use of remote working from home by more than 1 million people (27.8% of total employment).

The active population

The active population (5,009.6 thousand people) accounted for the lowest value in the series started in 2011, with reductions of:

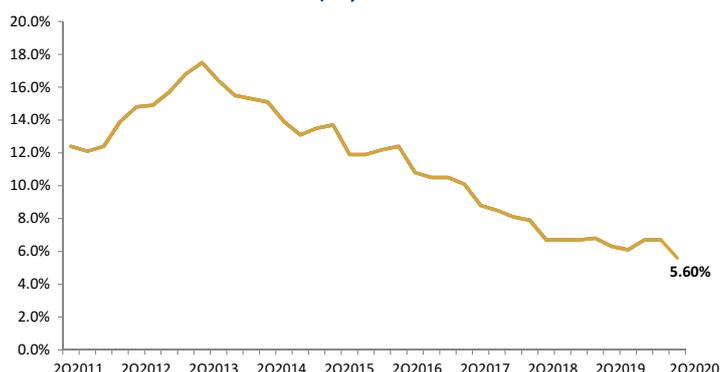
- 3.9% (204.3 thousand) compared to the previous quarter;
- 4.5% (235.5 thousand) vis-à-vis the same quarter a year earlier.

Employment rate



In the 2nd quarter of 2020, the employment rate (population aged 15 and over) stood at 53.2% (-1.5 p.p. than in the previous quarter and -2.3 p.p. compared to the same quarter of 2019).

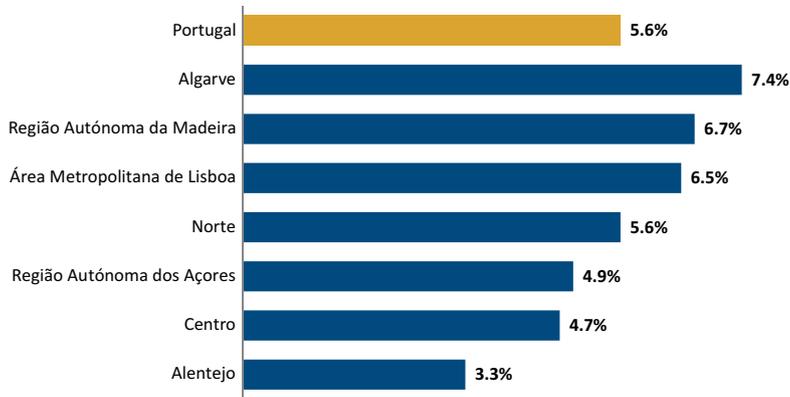
Unemployment rate



In the 2nd quarter of 2020, the unemployment rate stood at 5.6% (-1.1 p.p. than in the 1st quarter of 2020 and -0.7 p.p. from the same quarter of 2019).

In the same period, the youth unemployment rate (population aged 15 to 24) was 19.9% (+0.2 p.p. than in the 1st quarter of 2020).

Unemployment rates by NUTS II region,
2nd quarter of 2020



In the 2nd quarter of 2020, the unemployment rate stood above the national average in three regions of the country: Algarve, Região Autónoma da Madeira, and Área Metropolitana de Lisboa.

In the 2nd quarter of 2020, the active population (5,276.3 thousand people), increased by:

- 4.1% (206.1 thousand) from the previous quarter;
- 5.2% (259.1 thousand) compared to the same quarter of 2019.

The inactive population aged 15 and over (3,886.7 thousand people; 73.7% of the total inactive population) increased by:

- 5.7% (210.3 thousand) from the previous quarter;
- 7.5% (270.3 thousand) compared to the same quarter of 2019.

These were the highest quarterly and year-on-year rates of change recorded since 2011 for the inactive population aged 15 and over.

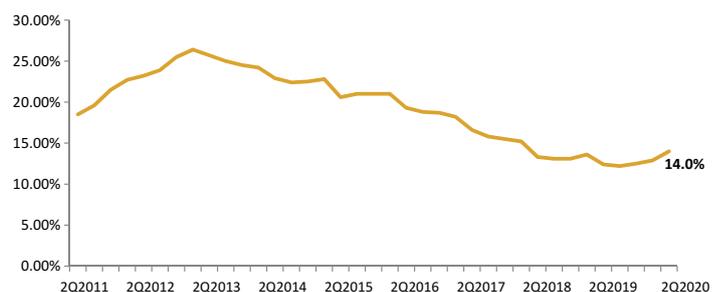
The inactivity rate (15 years old and over) stood at 43.7% (+2.3 p.p. from the previous quarter and +2.9 p.p. compared to the same period of 2019).

Labour underutilization

The labour underutilization indicator aggregates:

- The unemployed population;
- The underemployment of part-time workers;
- The inactive looking for a job, but not available to work;
- The inactive available, but not looking for a job.

Labour underutilization rate



Given the restrictions on mobility associated with the pandemic, the analysis of the evolution of this indicator is particularly relevant in this context.

In the 2nd quarter of 2020, the labour underutilization included 748.7 thousand people and the corresponding rate was 14.0%.

The labour underutilization increased by 7.8% (54.0 thousand people) compared to the previous quarter and 10.7% (72.2 thousand) vis-à-vis the same quarter of 2019

More information available at:
[Employment statistics – 2nd quarter of 2020](#)
(5 August 2020)

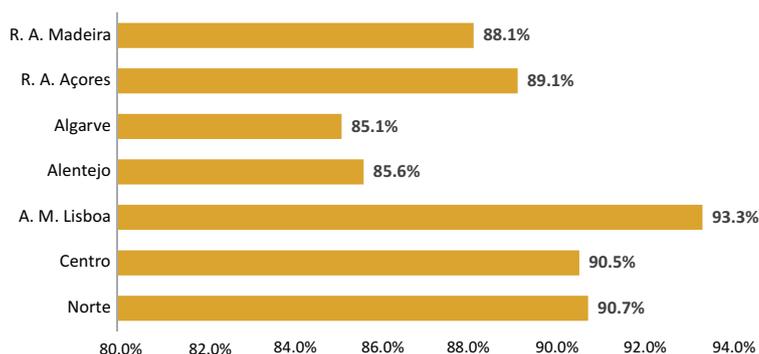
Working from home due to the pandemic covered one million people

In the 2nd quarter of 2020, concerning the total population employed, estimated at 4,731.2 thousand people:

- 1,094.4 thousand (23.1% of the total) worked always or almost always from home during the reference week* or in the three preceding weeks;
- Of these, 998,500 (91.2%) indicated that the main reason for working from home was due to the COVID-19 pandemic;
- The percentage of women in employment working from home (25.2%) was higher than that of men in the same situation (21.2%);
- The Área Metropolitana de Lisboa was the region with the highest proportion of employees working from home: 36%;

* The characteristics observed in the survey mainly refer to the situation of the respondent during a predefined week called the reference week. The reference weeks, by which the respondents are distributed, are evenly spread over the quarter.

Employed population who has always or almost always worked from home due to COVID-19, by NUTS II region



- There was almost no difference in the average number of hours worked between those who worked from home (35 hours) and those who did it outside their home (36 hours);
- 1,038.0 thousand people used information and communication technologies to be able to exercise their profession from home, which corresponds to:
 - 21.9% of the total employed population;
 - 94.8% of people who worked always or almost always from home in the reference period;

- 643,800 people did not work in their main job during the reporting period, either from home or elsewhere, of which 491,500 (76.3%) were due to the COVID-19 pandemic.

Of the 998,500 who indicated that the main reason for working from home was due to the COVID-19 pandemic:

- 55% were women;
- 42.9% lived in Área Metropolitana de Lisboa;
- 72,4% completed tertiary education;
- 90.0% were employees;
- 58.4% were professionals working in intellectual and scientific activities;
- 29.4% of those working in the tertiary sector (87.2%) were working in education.

More information available at:

[Labour force survey ad hoc module – 2nd quarter of 2020](#)
(5 August 2020)

Gross monthly earnings per employee increased by 1.6% in the quarter ended in June 2020, to €1,326, below the quarter ended in March (3.2%)



In the 2nd quarter of 2020, compared to the same period of 2019:

- The average monthly gross earnings per employee increased by 1.6% to €1,326 (it had increased by 3.2% in the 1st quarter, also in year-on-year terms);
- The regular gross monthly earnings (excluding holiday and Christmas allowances) increased by 2.6% and stood at €1,065 (+3% in the 1st quarter);
- The base gross monthly earnings increased by 3.0% to €1,005 (the same rate of change as in the 1st quarter).

In real terms (taking into account the rate of change in the Consumer Price Index over the same period), the increases were:

- Gross earnings: 1.8%;
- Regular earnings: 2.8%;
- Base earnings: 3.3%.

In the 2nd quarter of 2020, the gross earnings:

- Varied between:
 - €761, in *Accommodation and food services*, and
 - €3,074, in the *Electricity, gas, steam, and air conditioning supply* sector.

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- Increased the most, in year-on-year terms, in the sectors:
 - *Administrative and support service activities*: 5.5%;
 - *Education*: 4.2%.
- Decreased the most, in year-on-year terms, in the sectors:
 - *Electricity, gas, steam, cold and hot water and cold air*: -9.5%;
 - *Transportation and storage*: -7.6%;
 - *Arts, entertainment, sports and recreation activities*: 6.6%;
 - *Accommodation and food services activities*: 5.1%.

The dynamics of average earnings in the 2nd quarter of 2020 were significantly influenced by the implementation of the simplified layoff regime.

The results presented relate to around 4.0 million employees, corresponding to Social Security beneficiaries and Caixa Geral de Aposentações subscribers.



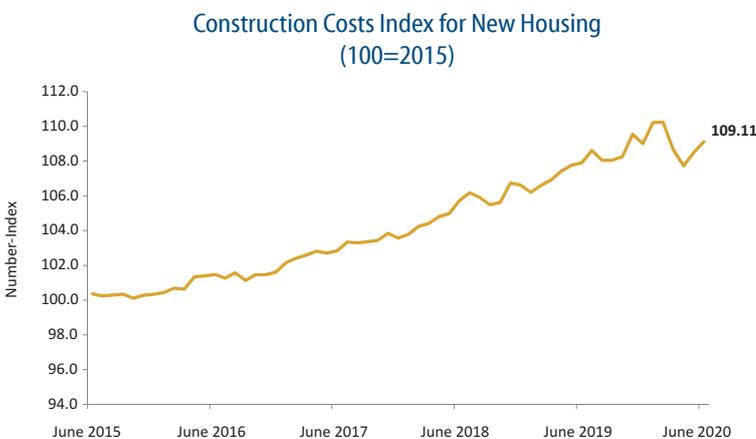
The statistics on “Gross monthly earnings per employee” are the result of the calculations and analysis performed by Statistics Portugal on the information from the Monthly Statement of Earnings (DMR – Declaração Mensal de Remunerações) from Social Security (SS), following a protocol celebrated between Statistics Portugal and the Instituto de Informática, I.P., and the Contributive Relation (RC – Relação Contributiva) of Caixa Geral de Aposentações (CGA). These statistics are stored in the [STATSLAB](#) area of the Statistics Portugal website, where new statistical resources that give useful information for economic and social analysis are published.

More information available at:
[Gross monthly earnings per worker](#)
(6 August 2020)

Housing construction costs rose by 1.1% on a year-on-year basis

In June, the year-on-year rate of change in the Construction cost index for new housing (CCINH) was estimated at 1.1% (+0.4 percentage points (p.p.) than in the previous month).

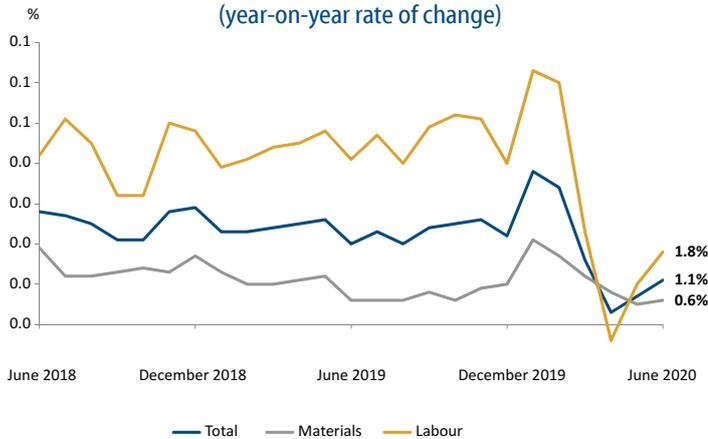
The price of materials and labour costs increased in June by 0.6% and 1.8%, respectively (0.5% and 1.0% in May, in the same order).



Note: The value for June 2020 is provisional.



Construction Costs Index for New Housing
(year-on-year rate of change)



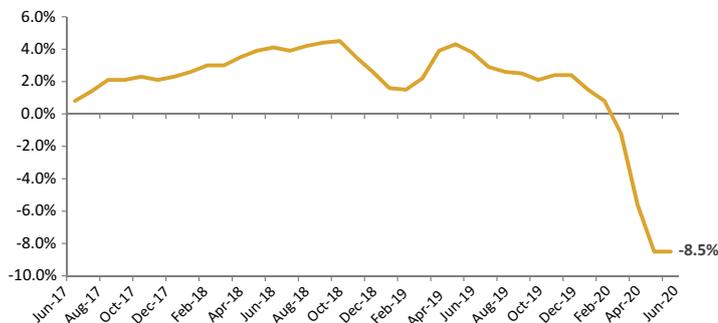
In June, the CCINH increased by 0.6%, compared to the previous month. The price of materials and the labour costs varied by -0.3% and 1.9%, respectively (0.0% and 1.7% in May, in the same order).

More information available at:
[New housing construction cost index – June 2020](#)
(7 August 2020)

Note: The value for June 2020 is provisional.

Construction production index decreased by 8.5%

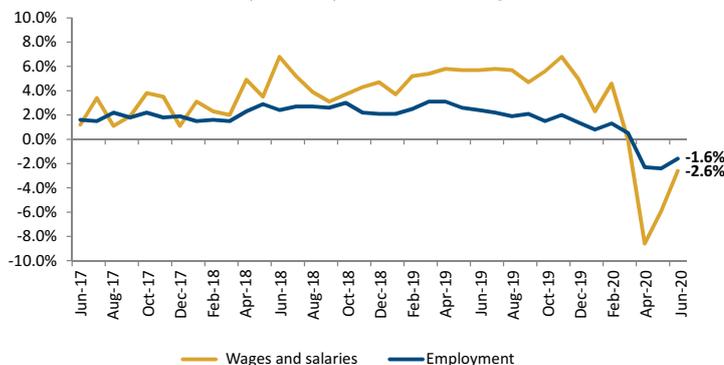
Index of Production in Construction
(year-on-year rate of change)



The index of production in construction decreased by 8.5% in June in year-on-year terms (the same rate of change as in May), with the following outcomes:

- *Building construction*: -8.3% (-8.4% in May);
- *Civil engineering*: -8,8% (-8.7% in May).

Employment and Wages and salaries Indices
(year-on-year rate of change)



In June, the employment and wages and salaries indices in Construction registered:

- Year-on-year rate changes of -1.6% and -2.6% respectively (-2.4% and -5.9% in May, in the same order);
- Month-on-month rates of change of 0.7% and 13.8% respectively (-0.1% and 10.0% in June 2019, in the same order).

More information available at:
[Production, employment, wages and hours worked indices in Construction – June 2020](#)
(7 August 2020)

In June, exports and imports of goods decreased by 10.1% and by 23.1% respectively, in nominal terms

In June 2020, exports and imports of goods recorded year-on-year rates of change of -10.1% and -23.1%, respectively (-38.7% and -39.8% in May 2020, in the same order). The decreases occurred in both intra-EU and extra-EU trade.

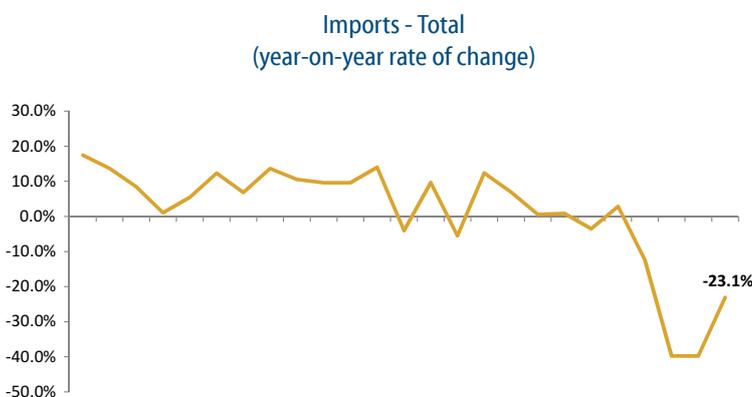
Most product categories in international trade presented significant declines in June, in particular:

- In exports: *Industrial supplies* (-13.0%);
- In imports: *Transport equipment* (-49.4%) and *Fuels and lubricants* (-65.5%).



In June, excluding *Fuels and lubricants*, exports decreased by 7.6% (-34.8% in May) and imports declined by 17.2% (-34.7% in May).

In June 2020, concerning the main partner countries in 2019, there were decreases in exports to all the main partners, particularly in comparison with June 2019. The decrease in exports to Spain (7.3%), due to the decline in exports of *Industrial supplies*, *Consumer goods*, and *Fuels and lubricants* stood out.



In June 2020, the decrease in imports from France (-55.0%) stands out, mostly due to *Other transport equipment* (airplanes).

The only increases were registered in imports from China (due to the increase in *Consumer goods*, essentially personal protective equipment, mostly masks, and the increase in *Capital goods*) and imports from the Netherlands (+20.5% and +4.7%, respectively).

In June 2020, the deficit of trade balance of goods was EUR 828 million (EUR -1,049 million compared to June 2019).

Excluding *Fuels and lubricants*, in June 2020, the trade balance stood at EUR -665 million, corresponding to a decrease of EUR 664 million in the trade deficit vis-à-vis June 2019.

More information available at:
[International trade statistics – June 2020](#)
(7 August 2020)

Press releases between 10-08-2020 to 14-08-2020:

Press Releases	Reference period	Release date
Business turnover, employment, wage and hours worked indices in industry	June 2020	10 August 2020
Business turnover, employment, wage and hours worked indices in services	June 2020	10 August 2020
Consumer price index	July 2020	12 August 2020
Labour cost index	2 nd Quarter 2020	13 August 2020
Quarterly National Accounts - Flash Estimate	2 nd Quarter 2020	14 August 2020
Tourism activity	June 2020	14 August 2020