



LIVING & HOSPITALITY

PORTUGAL REAL ESTATE SUMMIT 2026

10 € 1 MILLION

9 € 500,000

8 € 250,000

7 € 100,000

6 € 50,000

5 € 25,000

4 € 10,000

3 € 5,000

2 € 1,000

1 • € 500



500

Investment in the Spanish Living sector alone is larger than in the total Portuguese CRE market, by how many times?

A: 1.0 X

B: 1.5 X

C: 2.0 X

D: 2.5 X

Votes: 0



C: 2.0 x

Living, especially BTR / PRS, has limited weight and constrains total investment volumes in Portugal.

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1,000

How many additional beds for students would Portugal need by 2030 to reach Continental Europe's average provision rate of 15%?

A: 43,000

B: 52,000

C: 67,000

D: 78,000

Votes: 0



C: 67,000

**67,000 new PBSA beds would represent
€4-5 billion in additional investment volume.**

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5,000

What percentage of Portuguese households are composed of just 1-2 people?

A: 31%

B: 41%

C: 51%

D: 61%

Votes: 0



D: 61%

Flex Living potential demand is already here, with more than 500,000 new small households emerging in the last five years.

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10,000

How many Build-to-Rent (BTR) transactions have been completed in Portugal over the past five years?

A: 0-5

B: 6-10

C: 11-15

D: >15

Votes: 0



A: 0-5

**First BTR projects underway;
full potential hinges on overcoming barriers.**

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25,000

Keeping current construction volumes, how many additional homes does Portugal need to build by 2035 to keep up with household demands?

A: 90,000

B: 140,000

C: 180,000

D: 220,000

Votes: 0



D: 220,000

The deficit of additional 220,000 homes exceeds the 172,000 completions from the last decade.

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50,000

How many additional beds for seniors will Portugal need by 2050 to keep pace with the 80+ population?

A: 25,000

B: 50,000

C: 70,000

D: 100,000

Votes: 0



C: 70,000

**70,000 new beds for seniors would represent
€ 3-4 Bn in additional investment volume.**

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100,000

Rank these Living sub-sectors by prime yield in Portugal, highest to lowest:

A: BTR > PBSA > Senior Living

B: Senior Living > PBSA > BTR

C: PBSA > Senior Living > BTR

D: All within 25bps

Votes: 0



B: Senior Living > PBSA
> BTR

Operational risk premium is the key, explaining why Senior Living yields are the highest.

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250,000

How much has Portugal's hotel RevPAR grown from the pre-pandemic levels of 2019 until 2025?

A: 10%

B: 20%

C: 30%

D: >40%

Votes: 0



D: >40%

METRIC	2019	2025	Δ
ADR	€89	€110	+23%
Occupancy	55%	66%	+11 %
RevPAR	€49	€72	+47%

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500,000

Which tourist source market has grown fastest for the Greater Lisbon Area since 2019?

A: UK

B: Canada

C: United States

D: Poland

Votes: 0



B: Canada

SOURCE MARKET	VAR. 2019/25 (%)
Canada	+99%
USA	+87%
Poland	+39%
UK	+25%

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1,000,000

What is the share of Owner Operated hotels in Portugal for properties with more than 50 keys?

A: 40%

B: 60%

C: 80%

D: 90%

Votes: 0



C: 80%

Major opportunity for consolidation and increased institutional capital.

