

2020

Tourism in Figures

Sofia Tourism Administration

Edition 2021

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Sofia Tourism Administration is pleased to present the new edition of the statistical guide *Sofia - Tourism in Figures*. The publication is intended for all interested in information about the state of the tourism sector in the capital in 2020 - year marked by the Covid 19 pandemic and a global crisis in the tourism industry.

Initially, 2020 seemed to be a continuation of the long-term growth trends regarding the main indicators, as the first months - January and February, marked another increase in the number of visitors and overnight stays. The pandemic interrupted the tourism development of Sofia and in the following months of 2020 the tourism industry faced constant travel restrictions, local and national restrictions in the country and on foreign tourism markets, full or partial lockdowns, a series of bans and restrictions regarding activities in the main sectors - hotels and restaurants, as well as in the transport and additional services sector, and in the work of cultural institutions.

Despite the sometimes impossible conditions, the tourism sector of Sofia survived and the destination continued to invest in job preservation, development of the accommodation facilities and quality services. New 5-star hotels were opened, the metro network was expanded and the urban environment was improved, new cultural and historical sites as well as cultural events were developed.

Hoping for better travel conditions, Sofia welcomed 2021 as a safe European destination, eager to welcome its guests again.

NOTE

Like the 2019 edition, this one uses statistical information from the National Statistical Institute (NSI) and the Unified Tourist Information System (UTIS).

2020 is the first full year in the operation of the UTIS, which allows the formation of the overall picture of supply and demand, but not a reliable basis for comparison with 2019. Therefore, this issue relies on official NSI statistics on performance indicators such as overnight visitors and overnight stays for 2020 in order to be able to compare them with the previous year, and the UTIS data are used to provide more details regarding the tourism markets.

DEMOGRAPHIC AND ECONOMIC CHARACTERISTICS

As of December 31, 2020, the permanently registered residents of Sofia are 1 360 185.

Sofia Municipality is divided into 24 administrative districts, the most populous of which are Lyulin (9,3%) and Mladost (8,7%). The district with the lowest population is Bankya.

16	Studentska	37,502	2.76
17	Bankya	12,263	0.90
18	Izgrev	37,999	2.79
19	Kremikovtsi	24,394	1.79
20	Vrabnitsa	52,656	3.87
21	Vitosha	74,017	5.44
22	Pancharevo	27,101	1.99
23	Slatina	74,047	5.44
24	Vazrazhdane	50,938	3.74
Total		1,360,185	100.00

Source: *grao.bg*

Districts in Sofia		Residents (number)	Share (%)
1	Lyulin	126,433	9.30
2	Serdika	50,617	3.72
3	Krasno selo	91,819	6.75
4	Triaditsa	82,433	6.06
5	Mladost	118,536	8.71
6	Novi Iskar	27,339	2.01
7	Oborishte	38,148	2.80
8	Ovcha kupel	60,308	4.43
9	Ilinden	35,618	2.62
10	Iskar	71,516	5.26
11	Krasna polyana	64,645	4.75
12	Lozenets	63,471	4.67
13	Nadezhda	77,802	5.72
14	Sredets	102,263	7.52
15	Poduyane	83,427	6.13

Employed Persons in 2020

Information regarding the people employed in tourism establishments in Sofia, outside the one provided by the NSI¹, is collected by Sofia Municipality in the process of categorization - it is limited only to the tourism establishments, which under the Tourism Act are categorized by the Mayor of Sofia Municipality:

1. Accommodation establishments and the adjoining catering and entertainment establishments

- a) hotels – one- and two-star category;
- b) motels – all categories;
- c) family hotels – all categories;
- d) hostels – all categories;
- e) boarding houses – all categories;
- f) recreational resorts - all categories
- g) guest rooms – all categories;
- h) guest suites – all categories;
- i) guest houses – all categories;
- j) bungalows – all categories;
- k) campsites – all categories;

2. Stand-alone catering and entertainment establishments - one-, two- and three-star category

Sofia Tourism Administration does not have information about the persons employed in the tourism establishments categorized by the Minister of Tourism:

1. Accommodation establishments and the adjoining catering and entertainment establishments:

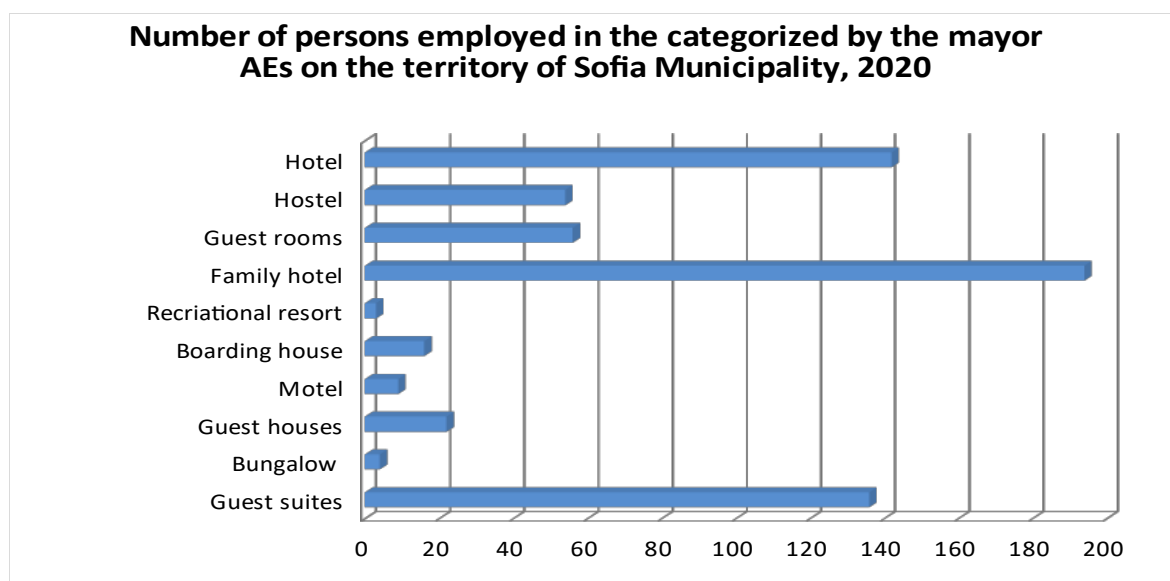
- a) hotels – three, four, and five-star category;
- b) apartment tourist complexes – all categories;
- c) holiday villages - all categories;
- d) tourist villages - all categories;
- e) villas - all categories,

2. Stand-alone catering and entertainment establishments - four and five-star category

According to Sofia Tourism Administration, 15 451 persons were employed in the places categorized by the mayor as accommodation establishments (AEs) and catering and entertainment establishments (CEEs) in 2020. Compared to 2019, there was a slight decline of 2,3%.

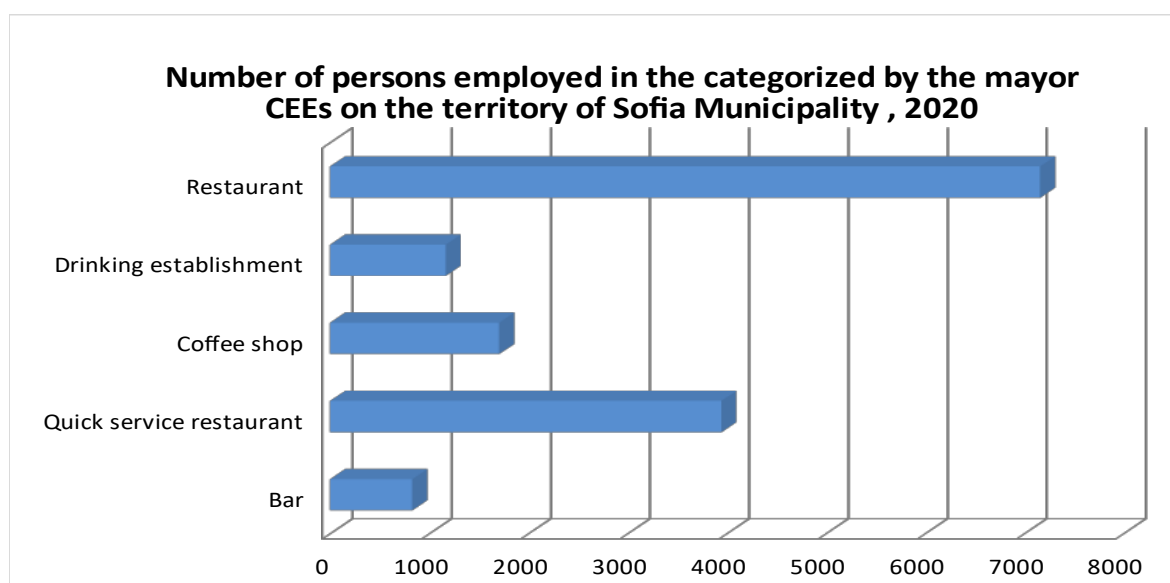
The highest number of persons employed in accommodation establishments was registered in family hotels (194 people), hotels (142 people) and guest suites (136 people).

1 At the time of preparation of this edition, no official NSI data for 2020 was published.



Source: Sofia Tourism Administration

The highest number of persons employed in CEEs was registered in restaurants (7 162 people). During the year, as a reflection of the labor restrictions, the number of employees in restaurants, bars and drinking establishments decreased, while the number of employees in quick service establishments increased by almost 10% and reached 3,947 people.



Source: Sofia Tourism Administration

TRANSPORT

AIR TRANSPORT

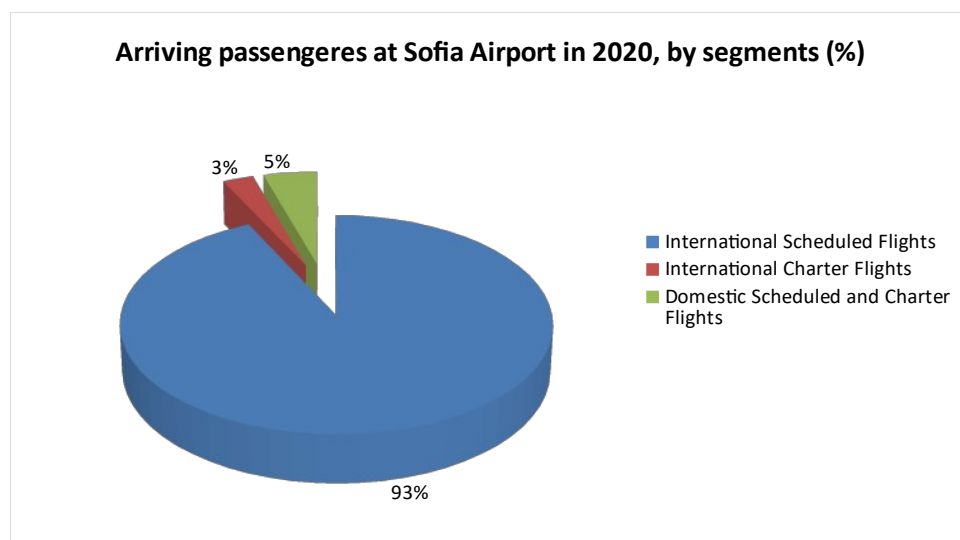
The pandemic interrupted the upward trend of passenger traffic in recent years at Sofia Airport. In 2020, the total number of arrivals on international and domestic scheduled and charter flights decreased by almost 60% and amounted to 1,407,947 passengers

Arriving passengers at Sofia Airport, 2018-2020

	2018	2019	2020	Variations (%) '20/'19
International Scheduled Flights	3200185	326647	1307380	-59.98
International Charter Flights	83416	108272	36660	-66.14
Domestic Scheduled and Charter Flights	151230	141046	63907	-54.69
Total number of passengers	3434831	351578	1407947	-59.95

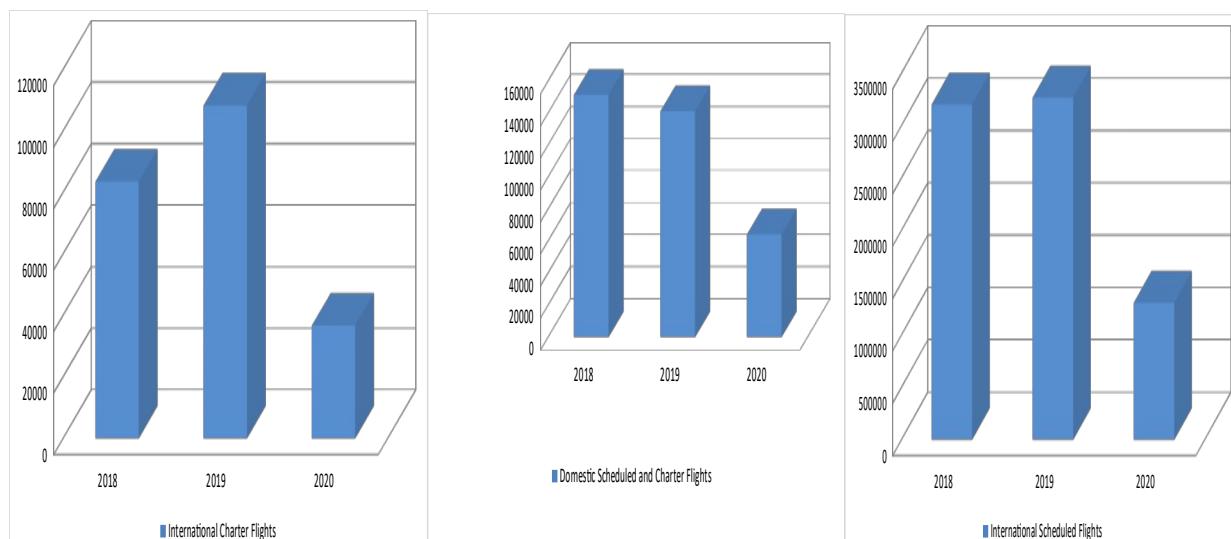
Source: Sofia Airport

The share of the arrivals remained the same – 93% of all arrivals were on international scheduled flights, while the arriving passengers on international charter flights and domestics scheduled and charter flights had a significantly smaller share – 3% and 4% respectively.



Source: Sofia Airport

In all passenger segments there is a general trend of significant decline, but there are still some differences. The most serious decline was in the number of passengers on international charter flights (66%) and international scheduled flights (60%), which is explained by the difficulties with international flights and organized tourism given the anti-epidemic restrictions introduced by various countries. Domestic flights reported a relatively smaller decline compared to 2019 - nearly 55%.



Source: Sofia Airport

Data on a monthly basis support the conclusion about the impact of the pandemic. The year started with positive results and growth of passenger traffic on international regular and charter flights, and the trend changed after March because of the height of the infection and the introduction of restrictions on travelling.

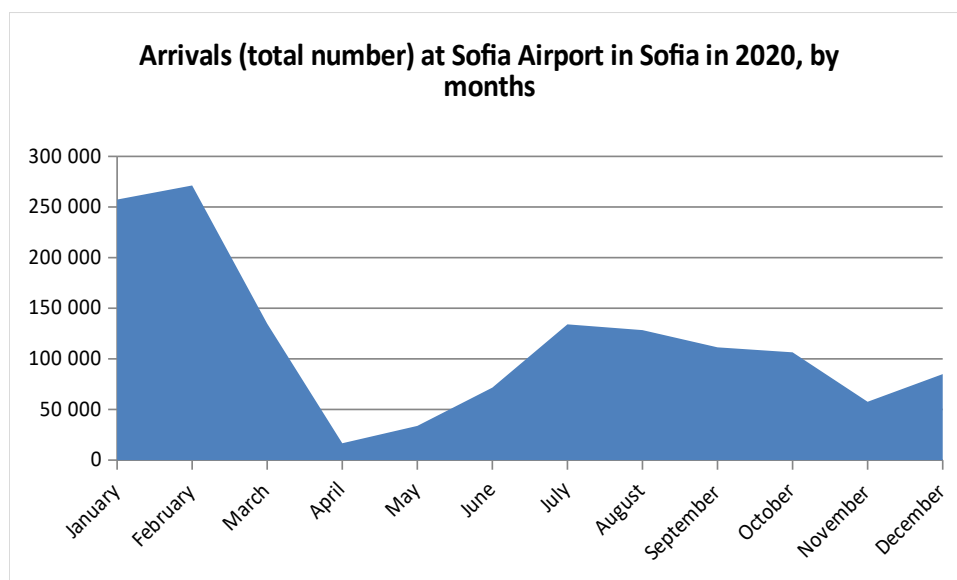
Arrivals at Sofia Airport, by segments and months, 2020/2019

	International Scheduled Flights	2019 International Charter Flights	Domestic Scheduled and Charter Flights	International Scheduled Flights	2020 International Charter Flights	Domestic Scheduled and Charter Flights	Variations 2020/2019 (%) International Scheduled Flights	International Charter Flights	Domestic Scheduled and Charter Flights
January	220,987	12,393	9,515	236,501	12,041	8,796	7.02	-2.84	-7.56
February	229,430	9,815	8,557	252,499	10,526	8,199	10.05	7.24	-4.18
March	257,364	8,476	10,007	126,800	3,701	4,263	-50.73	-56.34	-57.40
April	282,114	7,557	10,160	15,305	726	597	-94.57	-90.39	-94.12
May	297,921	11,086	11,022	30,861	1,567	1,291	-89.64	-85.87	-88.29
June	298,178	10,099	12,488	67,045	749	3,788	-77.52	-92.58	-69.67
July	331,410	6,707	16,669	125,937	910	7,215	-62.00	-86.43	-56.72
August	292,410	6,369	18,916	117,330	577	10,437	-59.87	-90.94	-44.82
September	262,259	13,721	15,128	101,400	2,304	7,665	-61.34	-83.21	-49.33
October	267,355	12,302	10,381	98,374	2,502	5,520	-63.20	-79.66	-46.83
November	241,202	4,228	9,187	53,764	655	3,165	-77.71	-84.51	-65.55

December	285,841	5,519	9,016	81,564	402	2,935	-71.47	-92.72	-67.45
Total number of passengers	3266471	108272	141046	1307380	36660	63871	-59.98	-66.14	-54.72

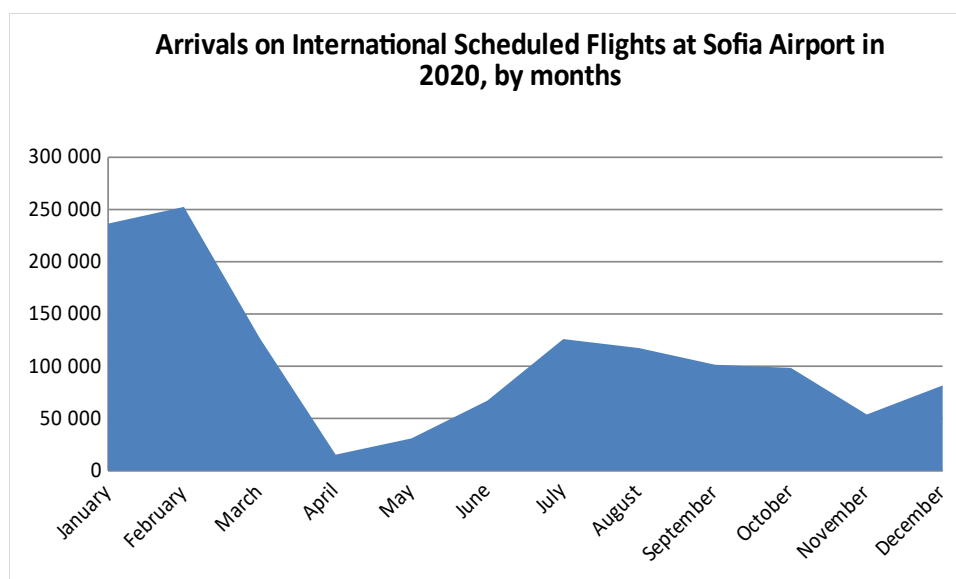
Source: Sofia Airport

The unusual situation predetermined an unusual peak in February in the total number of arrivals by months in 2020, when 271,224 passengers arrived. The declines in April and November, coinciding with the waves of the pandemic, were clearly outlined, and the situation in April was especially critical, when the decline in international segments reached 95% compared to 2019, and the total number of passengers was only 16,628. In general, for the period of the pandemic (April-December) a certain increase was reported during the summer months, with the highest number of arrivals in July - 134,062 people, but their number was 56% to 86% (for different segments) less compared to 2019 and less than half compared to passengers in the last pre-pandemic month (February).



Source: Sofia Airport

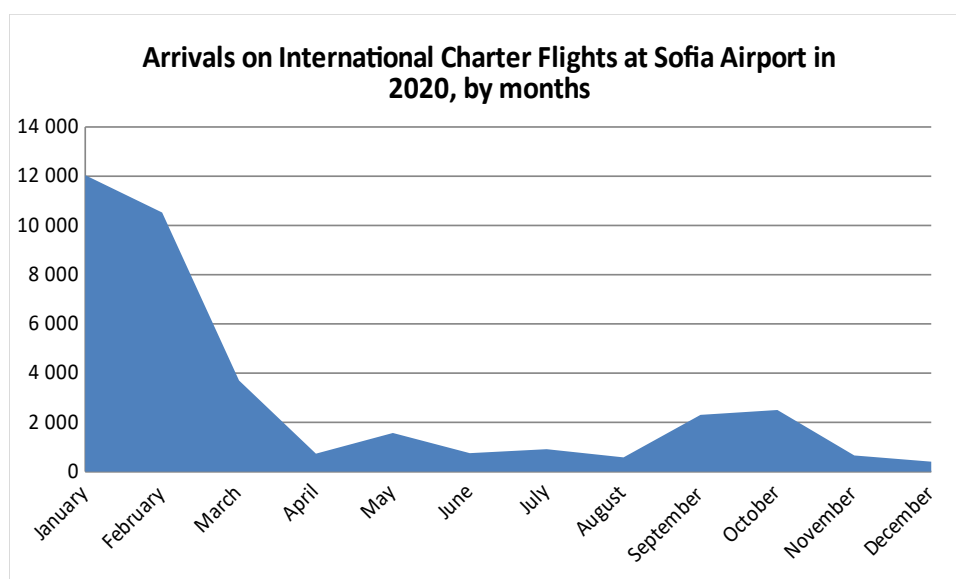
Arrivals on international scheduled flights by months had a similar structure to the total arrivals by months, which can be explained by their large share in the total number of arrivals.



Source: Sofia Airport

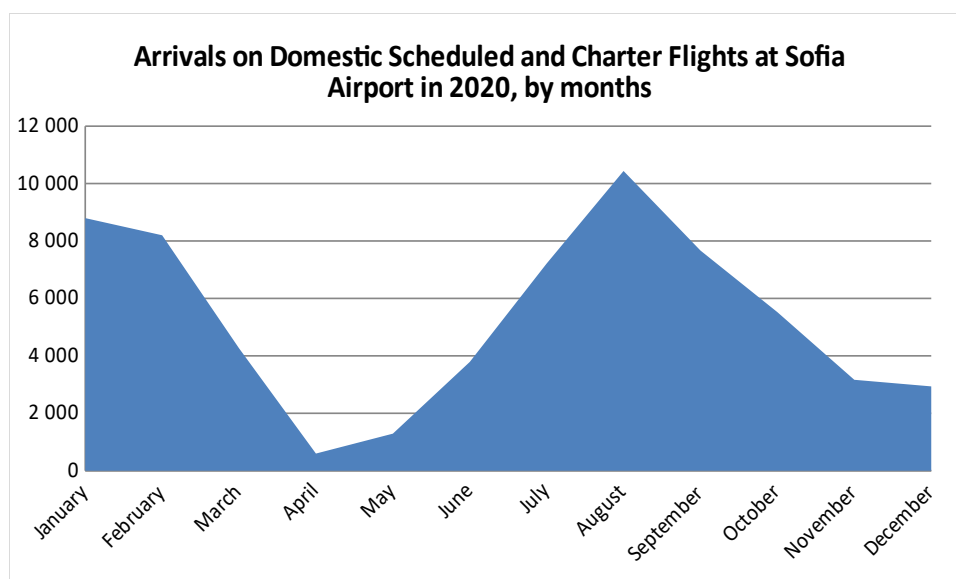
The number of arrivals on international charter flights marked significant fluctuations. After February, when there was an increase of 7.2% compared to 2019, arrivals fell sharply for the rest of the year.

Even during the summer months, the number of arrivals on international charter flights failed to recover and for the months of April-December it was between 80% and 93% less than in the corresponding months of 2019. The lowest number of arrivals was in December - only 402 people.



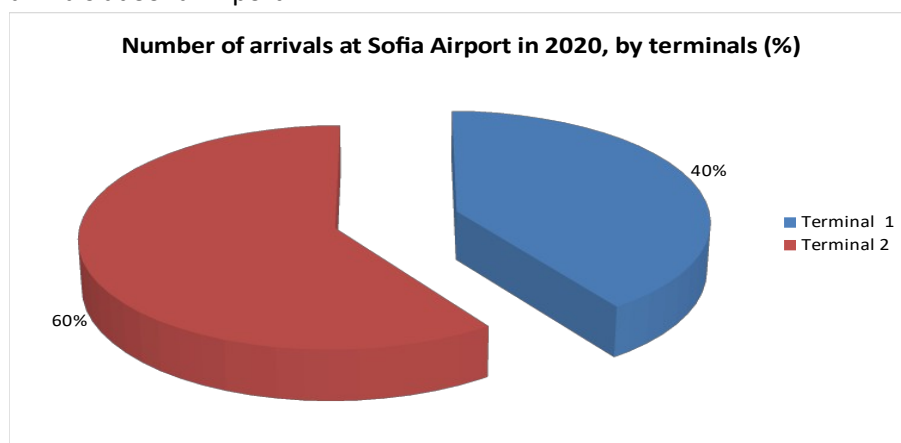
Source: Sofia Airport

Passengers on domestic scheduled and charter flights report similar declines to other segments in April-May and November-December. On the other hand, a peak of arrivals was reached in July and August, which corresponds to the usual monthly distribution. In August, the highest number of arrivals was registered - 10,437 people, and the smallest decrease during the pandemic months compared to the previous year (45%) was observed.



Source: Sofia Airport

Terminal 2 of Sofia Airport continued to receive most of the passenger traffic in 2020, serving 843,583 arriving passengers. Compared to 2019, the decrease was 63.1%. Terminal 1 handled 568,589 arriving passengers, which was 46% less than the previous year. The smaller decline at Terminal 1 predetermined a slight change in the structure of arrivals by terminals, as Terminal 1 slightly increased its share to 40% of the total number of arrivals at Sofia Airport.



Source: Sofia Airport

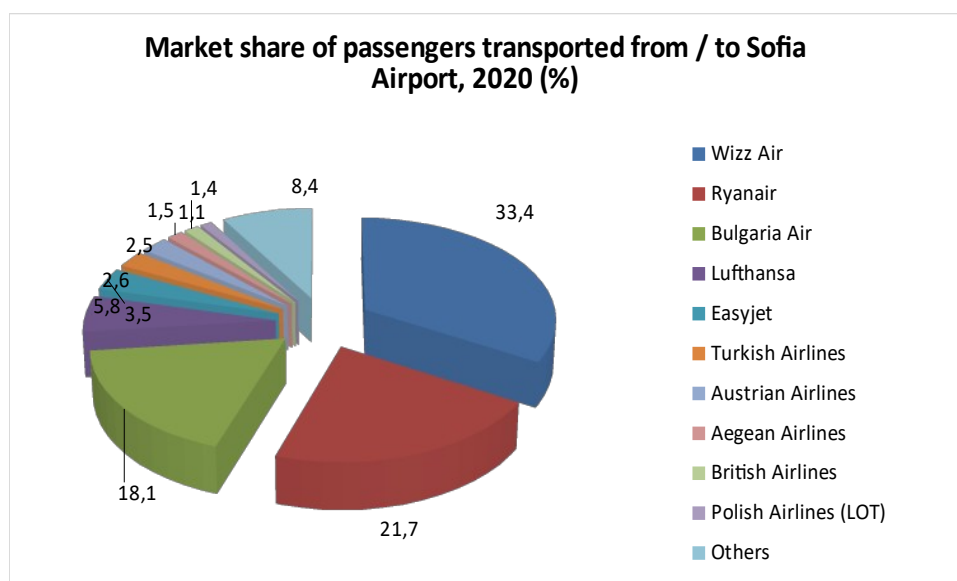
In 2020, scheduled and charter flights from and to 112 destinations were operated - 12 less than in 2019. London and Frankfurt remained the destinations with the highest number of arrivals. However, there were significant changes in the Top 10 destinations with the highest number of arrivals. Athens, Rome, and Milan were replaced by Paris, Eindhoven, and Amsterdam, and Varna became the 4th most important destination (number 7 in 2019).

Top 10 destinations according to the number of arrivals in 2020		
	Destination	Arrivals
1.	London	255 553
2.	Frankfurt	71 757
3.	Munich	65 000

4.	Varna	59 158
5.	Paris	50 882
6.	Vienna	50 423
7.	Eindhoven	45 240
8.	Brussels	43 897
9.	Tel Aviv	41 549
10.	Amsterdam	41 250

Source: Sofia Airport

Among the airlines operating flights to/from Sofia Airport there were some changes in 2020. The leader in the number of passengers transported from/to Sofia Airport remained the low-cost airlines Wizz Air (33,4 %) and Ryanair (21,7 %). Bulgaria Air - the national air carrier, retained the third position (18,3%) in terms of passengers transported from / to Sofia Airport. These three airlines, together with Easy Jet, managed to increase their positions, with the most significant increase in Wizz Air (+4.3 points) and Bulgaria Air (+2.9 points). Some of the main airlines serving the airport that lost shares compared to 2019 were Lufthansa and Austrian Airlines.



Source: Sofia Airport

BUS TRANSPORT

The bus traffic to and from Sofia (regular bus routes) passes mainly through 5 bus stations - Central Bus Station, Serdika Bus Station, Poduyane Bus Station, Yug Bus Station and Zapad Bus Station

The Central Bus Station is the largest bus station. It is a modern building with 7 173 square meters indoor area. There are 50 departure and arrival terminals. A total of 86 companies serve the bus station with different destinations in the country and abroad.

The other major bus station in Sofia, specializing mainly in international transport, is Serdika Bus Station. The Bus Station complex also includes a shopping complex with offices of transport companies, stores and restaurants, as well as underground and above ground parking with 1,000 parking spaces.

Poduyane, Yug and Zapad bus stations specialize mainly in domestic transport.

RAIL TRANSPORT

Sofia is accessible by rail and has the advantage of having the largest railway station in the country - Central Railway Station, which receives most of the railway traffic, including international trains. In 2020, international routes to Thessaloniki, Belgrade, Bucharest, Halkali, and Craiova continued to be maintained, but trains were suspended for long periods of time due to anti-epidemic restrictions.

The total number of passengers arriving from international and domestic destinations in 2020 decreased by at least 21% compared to 2019 and amounted to 1 880 000.

The decrease in arrivals by international trains in 2020 was even more significant - 78% as the number of passengers was 3 741, which stopped the trend of growth of arrivals from 2019.

Overall, 2020 reported the lowest number of arrivals for the last 10 years.



Source: Bulgarian State Railways

PUBLIC TRANSPORT

There is public transport in all towns and villages on the territory of Sofia Municipality. The public transport services on the territory of Sofia Municipality are realized by municipal and private operators and the control and coordination between them is carried out by Urban Mobility Center EAD.

A network of tram, trolleybus and bus lines and a metro operate on the territory of Sofia.

In 2020 there were up to 73 urban and suburban bus routes² served by 445 buses during rush hours. According to the methodology used by the Urban Mobility Center, the total number of transported passengers amounted to 130 364 000.

The fleet is subject to constant renewal and the average age of the vehicles was reduced to 8,95 years. At the same time, its environmental friendliness is increasing - 273 of the buses ran entirely on natural gas, and

² According to Stolichen Avtotransport EAD

another 20 were electric. The number of low-floor buses facilitating the access of people with reduced mobility was 487 buses - 26% more than in 2019.

In addition, 14 tram and 10 trolleybus routes were maintained as well as 3 electric bus routes. In 2020, more than 110 million passengers used public transport. The fleet included 279 tram trains, 91 of which (32.6%) had a low floor. The average age of the trains was 25.7 years. The fleet of trolleybuses consisted of 133 vehicles with an average age of 14.5 years, and the majority of them (73%) also had a low floor.

In 2020 the price of the tickets remained BGN 1.60, and the that of the package of 10 tickets – BGN 12. There are also different public transport passes. In addition to paper passes, electronic ones are also available.

The distribution of Sofia Card – a special travel pass designated for tourists in Sofia, continued. Sofia Card is a city-pass valid for 3 days and combines the right to unlimited travel by public transport with the opportunity to visit museums and various cultural and historical sites, as well as the use of various services at reduced prices. Its price in 2020 was BGN 20.



In 2020, the Sofia Metro had three metro lines with a total length of 48 km and 40 metro stations. The average number of passengers served per hour was 40 thousand people, and the total average daily number of passengers was 350 000. In 2020, a total of 57 million passengers were transported - a decrease of nearly 40% compared to the previous year.

Scheme of the metro lines at the end of 2020



The ticket price for one trip was BGN 1.6 and different electronic passes could also be used – their price varied between BGN 4 and BGN 600.

In 2021 it is planned to put into operation Stage 2 of Line 3 of the metro-section Ovcha kupel District – Gorna banya district with a length of 4 km and 4 metro stations. For the period until 2026, Line 3 should be extended by another 9 km and reach Arena Armeec Hall.

ACCOMMODATION

STRUCTURE OF ACCOMMODATION ESTABLISHMENTS BY TYPE

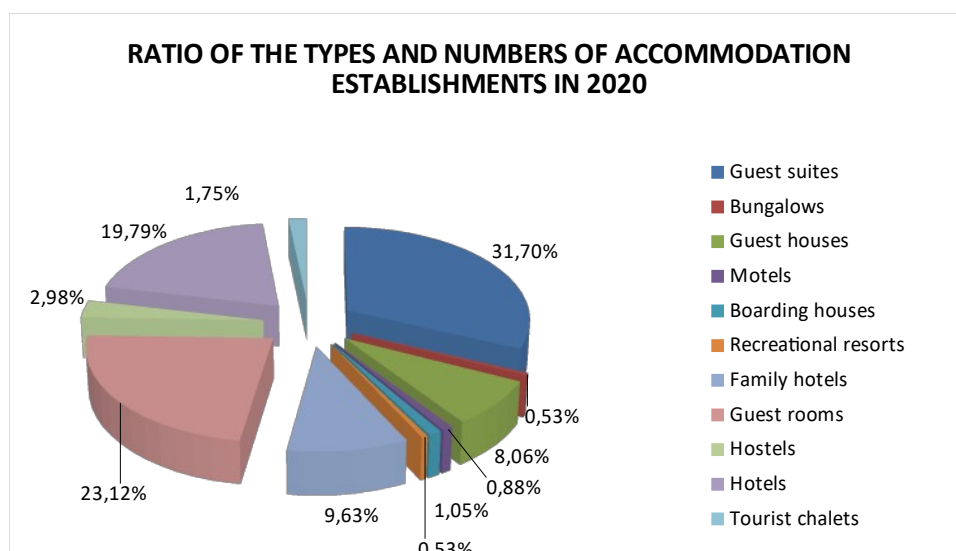
In 2019 571 accommodation establishments operated in Sofia – a decrease of 7% compared to the previous year. 466 (almost 11% less than in 2019) of them were categorized by the mayor of Sofia Municipality and 105 (an increase of 14%) – by the Minister of Tourism³.

Type of categorized accommodation establishments	Number of establishments		Variation 20/19 (%)
	2019	2020	
Guest suites	202	181	-10.40
Bungalows	4	3	-25.00
Guest houses	43	46	6.98
Motels	3	5	66.67
Boarding houses	8	6	-25.00
Recreational resorts	3	3	0.00
Family hotels	66	55	-16.67
Guest rooms	156	132	-15.38
Hostels	20	17	-15.00
Hotels	102	113	10.78
Villas	2	0	-100.00
Tourist chalets	5	10	100.00
Total	614	571	-7.00

Source: Sofia Tourism Administration

The distribution of the different types of accommodation establishments was characterized by significant changes in their development in 2020. While the number of the majority of the establishments decreased by between 10% and 100%, the number of hotels and guest houses increased by 10.78% and 6.98% respectively. This led to some changes in the structure of accommodation establishments by type compared to 2019 - guest suites and guest rooms retained their leading position with a share of all 31.7% and 23.1% respectively, but hotels increased their share and amounted to almost 1/5 of the accommodation establishments in Sofia.

³ The information in this section is based on data from the Municipal Tourism Register



Source: Sofia Tourism Administration

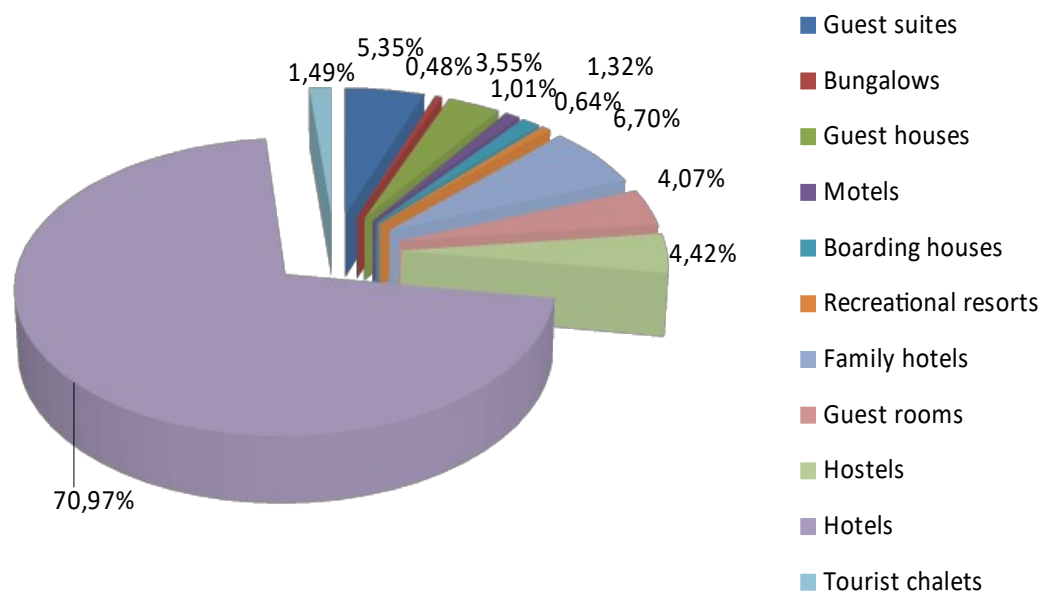
Despite the decrease in the number of establishments, the number of bed places of the accommodation establishments increased from 19,269 bed places in 2019 to 21,257 bed places in 2020 (+ 10.3%). The increase was primarily due to hotel bed places, which increased by 18.34% - 15,087 beds.

Type of categorized accommodation establishments	Number of		Capacity
	establishments	rooms	rooms
Guest suites	181	533	1137
Bungalows	3	42	101
Guest houses	46	324	754
Motels	5	95	214
Boarding houses	6	120	281
Recreational resorts	3	63	136
Family hotels	55	757	1424
Guest rooms	132	394	866
Hostels	17	380	940
Hotels	113	8372	15087
Tourist chalets	10	75	317
Total	571	11155	21257

Source: Sofia Tourism Administration

Although in terms of number hotels had a share of 20%, they provide the bulk of Sofia's bed places with a share of almost 71% of the total number of bed places.

RATIO OF THE TYPES AND CAPACITY OF ACCOMMODATION ESTABLISHMENTS IN 2020



Source: Sofia Tourism Administration

CATEGORY STRUCTURE OF ACCOMMODATION ESTABLISHMENTS

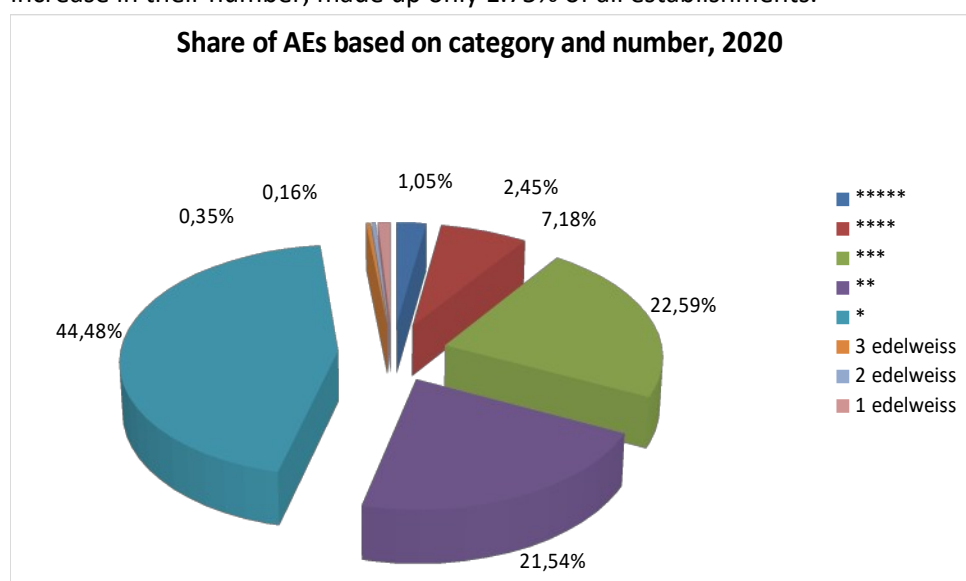
In 2020, there were conflicting trends in the development of accommodation establishments in terms of their category. On the one hand, the number of high-category AEs increased - the 4 and 5-star establishments increased by about 8%, which continued the trend from previous years. An increase was also observed in the number of 3 and 1 edelweiss AEs, whose number increased two and three times respectively. On the other hand, there was a decrease in the number of 1-3-star AEs, with most significant decrease in the number of 2-star AEs - a decrease of almost 14%.

Category	Number of establishments			Variation 20/19 (%)
	2018	2019	2020	
*****	11	13	14	7.69
****	37	38	41	7.89
***	143	148	129	-12.84
**	141	143	123	-13.99
*	289	267	254	-4.87
3 edelweiss	1	1	2	100.00
2 edelweiss	1	2	2	0.00
1 edelweiss	2	2	6	200.00
Total	625	614	571	-7.00

Source: Sofia Tourism Administration

The number of 1 – 3-star AEs continued to predominate. The most significant remained the share of 1-star establishments, which accounted for 44.5% - a comparable share with that in 2019 (43.49%). Slight reduction is observed among the 2 and 3-star AEs - 21.5% and 22.6% respectively. Despite the tendencies for increase in the number of 4 and 5-star AEs in recent years, their share continued to be small - 7.18% and 2.45%

respectively. The 1 - 3-edelweiss AEs had the most insignificant share in the structure, which, despite the increase in their number, made up only 1.75% of all establishments.



Source: Sofia Tourism Administration

The overall increase in the number of bed places in 2020 was accompanied by interesting specifics according to the category of AEs. In general, the increase in bed places affected establishments of all categories, except those with 1 and 2 stars. The most serious increase was recorded in the number of bed places in 4 and 5-star AEs - 761 and 687 bed places respectively, which corresponds with the increase in the number of establishments. Despite the decrease in the number of AEs, growth was also registered in 3-star bed places, which were 15.13% more or 4,284 beds. The most serious was the relative growth of the bed places in 1 - 3 edelweiss AEs, but their basic absolute values were significantly lower.

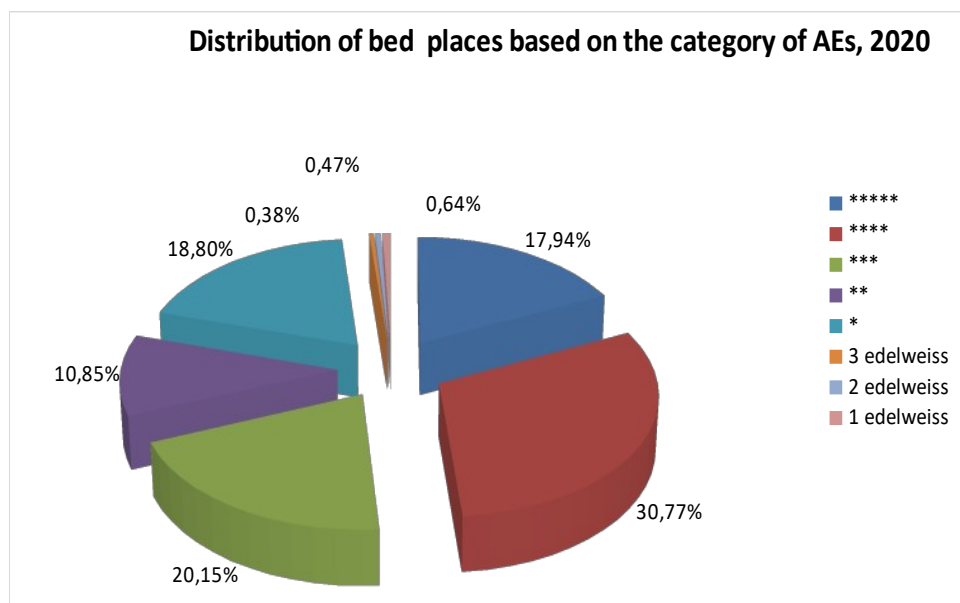
Category	2019		2020		Variations in the number of rooms 20/19 (%)	Variations in the number of bed places 20/19 (%)
	Number of rooms	Number of bed places	Number of rooms	Number of bed places		
*****	1769	3127	2202	3814	24.48	21.97
****	3139	5779	3537	6540	12.68	13.17
***	2088	3721	2410	4284	15.42	15.13
**	1261	2512	1160	2306	-8.01	-8.20
*	1815	4001	1771	3996	-2.42	-0.12
3 edelweiss	10	20	33	80	230.00	300.00
2 edelweiss	32	60	24	100	-25.00	66.67
1 edelweiss	18	48	18	137	0.00	185.42
Total	10132	19268	11155	21257	10.10	10.32

Source: Sofia Tourism Administration

The largest share of the bed places in Sofia were reported in 4-star AEs - 30.77%, and together with the bed places in 5-star AEs (17.94%) increased their importance in the structure of the bed places by category of AEs in the capital - almost half (48.7%) of the bed places in Sofia were in high category AEs. Taking into account the share of beds in 3-star AEs (20.15%), the category structure was dominated by the bed places in middle- and high-class AEs - over 2/3 of all beds.

The decrease in the number of bed places in 1- and 2-star AEs was reflected in the reduction of their shares in the category structure (10.85% and 18.8% respectively), with which they lost a total of over 4 points compared to 2019.

1-3 edelweiss AEs offered a total of only 317 bed places and their share in the total number of bed places was insignificant (less than 2%).



Source: Sofia Tourism Administration

KEY ACCOMMODATION DEMAND INDICATORS

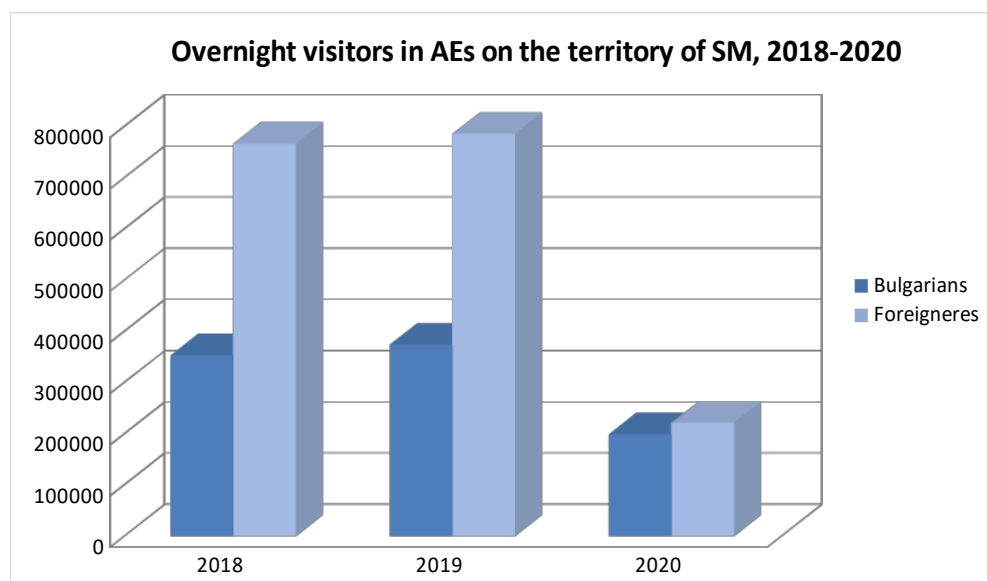
Overnight Visitors

The pandemic in 2020 stopped the continuous increase in the number of overnight visitors in AEs on the territory of Sofia Municipality. After the record-breaking 2019, there was a huge decrease of 63.72% and in 2020 the accommodation establishments welcomed 420,849 guests according to NSI statistics⁴.

Nationality	2018		2019		2020		Variation 20/19
	Number	Share	Number	Share	Number	Share	
Bulgarians	353579	31.55	374275	32.26	199226	47.34	-46.77
Foreigners	767103	68.45	785887	67.74	221623	52.66	-71.80
Total:	1120682	100%	1160162	100	420849	100	-63.72

Source: NCI

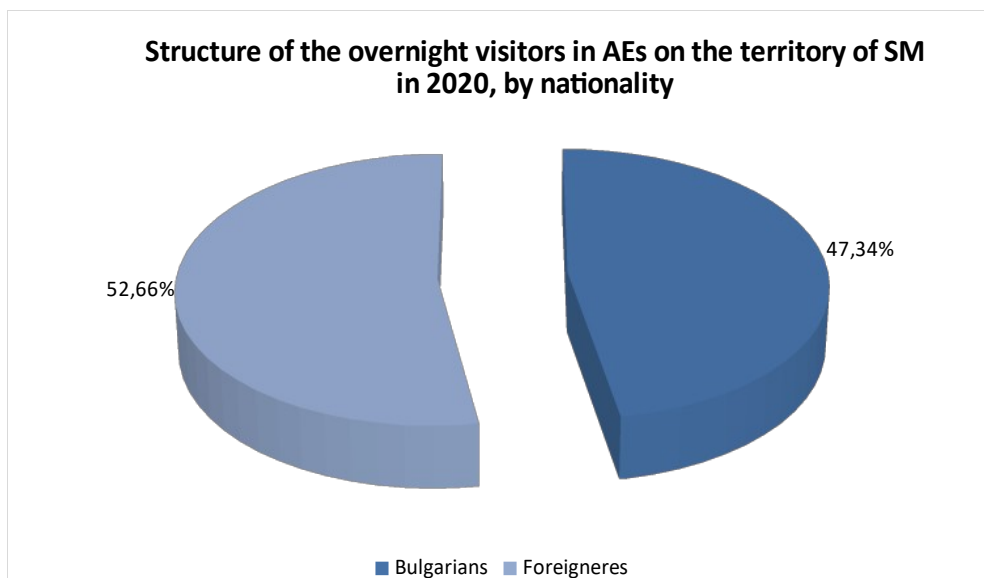
A decrease in the number of overnight visitors was registered both among foreign tourists - a total of 222,163 people or a decrease of 71.8%, and among Bulgarians, whose number compared to 2019 decreased by 46.77% - a total of 199,226 overnight visitors.



Source: NCI

The significant difference in the rates of decline for Bulgarians and foreigners led to significant changes in the structure of overnight visitors by nationality. In 2019, foreigners accounted for about 68% of all guests in AEs, but the pandemic almost "equalized" the shares and the structure for 2020 was significantly more balanced - 52.66% of all tourists were foreigners and 47.34% - Bulgarians.

⁴ The NSI statistics cover AEs with 10 and more bed places



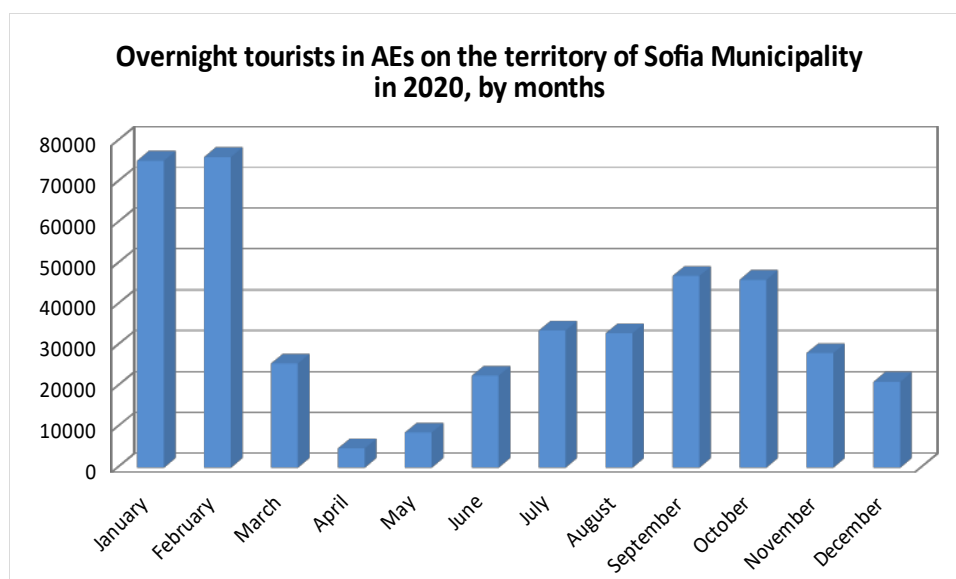
Source: NCI

The distribution of overnight visitors as a total number by months in 2020 is uneven and reflects the course of the pandemic. After the usual number of overnight visitors, the months of January and February were followed by a huge decline due to the onset of the pandemic and the introduction of lockdown in March and especially in April and May, which were the months with the lowest number of overnight visitors during the year. The summer months recorded a timid recovery in the number of visitors, followed by a new decline in November and December.

Number of overnight visitors in 2020 by month			
	Bulgarians	Foreigners	Total
January	29171	46002	75173
February	31113	44939	76052
March	10438	15053	25491
April	2269	2416	4685
May	4827	3749	8576
June	12772	9723	22495
July	18916	14635	33551
August	17203	15697	32900
September	25789	21116	46905
October	22436	23542	45978
November	13251	14798	28049
December	11041	9953	20994
TOTAL	199226	221623	420849

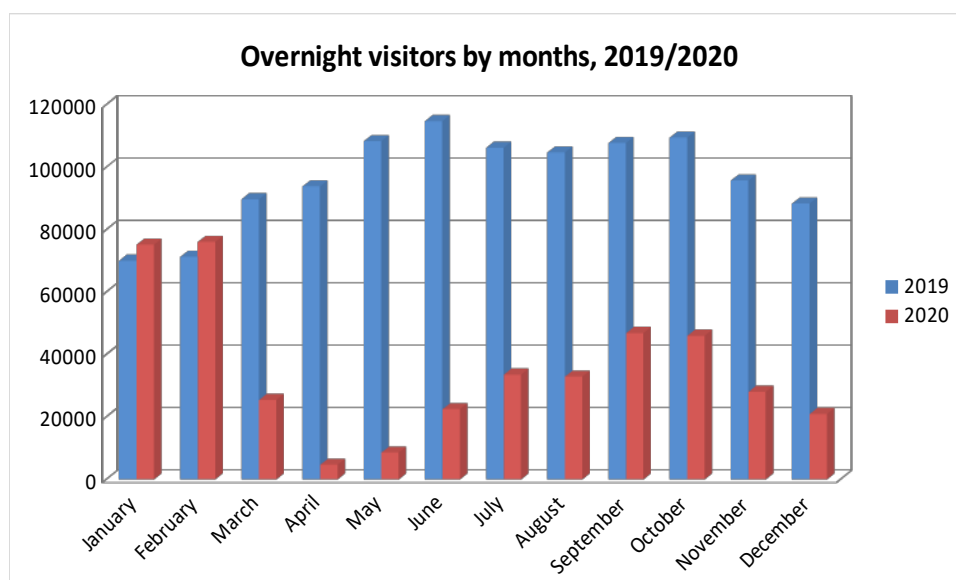
Source: NCI

The highest number of overnight visitors was reported in January and February - 75 173 and 76 052 people respectively, which before the pandemic generally reported the lowest data in annual terms. With an average monthly value of 35,071 overnight visitors, the only other months that exceeded the average level were September and October.



Source: NCI

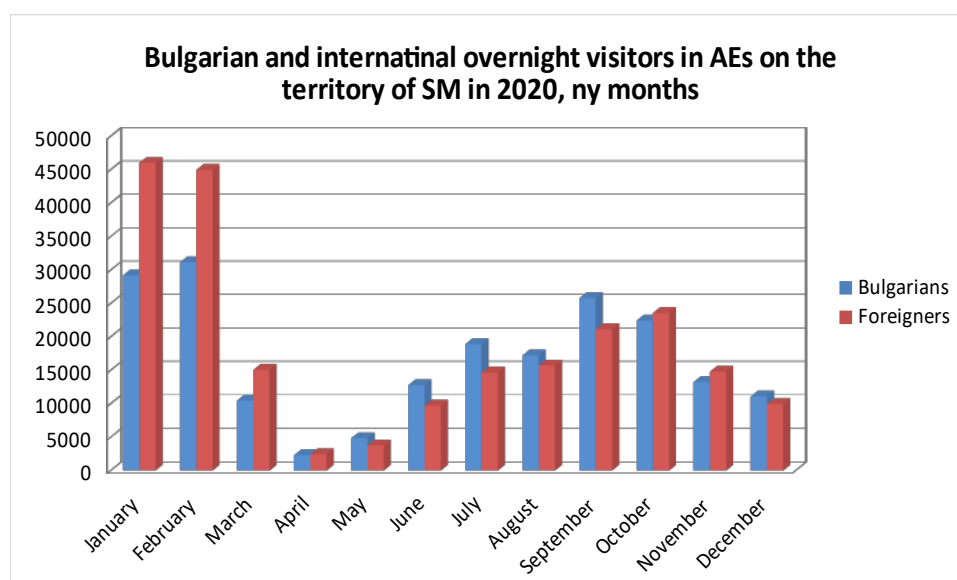
The comparison with 2019 by months offers new details regarding the annual distribution of overnight visitors. January and February started with an increase compared to 2019 - 7.3% and 6.7% respectively, remaining the only months with an increase in the number of guests. During the pandemic months (March - December) the largest decline was observed in April (95%) and May (92%), and for the usual peak month of June – there was a decrease of 80%. The months with the largest number of registered guests after the beginning of the pandemic - September and October, reported a decrease of 56.5% and 58% respectively in the number of overnight visitors.



Source: NCI

The distribution of overnight visitors by months among Bulgarians and foreigners does not show significant differences - the number of guests from both segments was balanced in March-December and the advantage of foreigners in the total number of overnight visitors is due entirely to the first 2 months of the year. This balance is not typical for Sofia, where up until 2020, on an annual and monthly basis, foreign guests had always had an advantage, and is due to restrictions on international travel.

During the year, most foreign guests were received in January (46,002 people), and Bulgarian residents - in February (31,113 people). In the months after the beginning of the pandemic, the highest number of overnight visitors for both Bulgarians and foreigners was in September and October, and the lowest - in April and May. Thus, the peak values on a monthly basis were shifted compared to 2019, when they were in June (for foreigners) and in December (for Bulgarians).



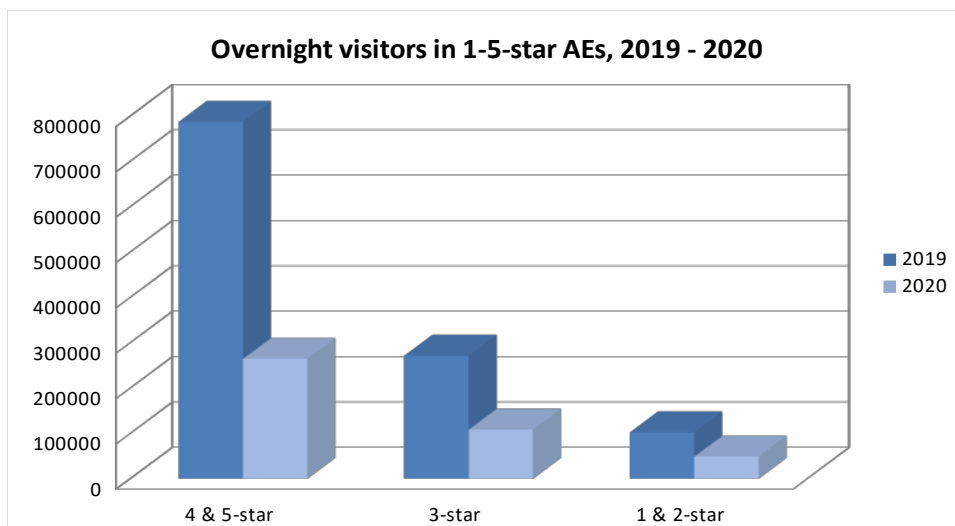
Source: NCI

The distribution of overnight visitors according to the category of AEs shows the most noticeable decrease in the high-category establishments, which welcomed a total of 522,785 fewer guests (-66.43%) compared to 2019. In 3-star AEs there was a decrease of 60.18%, and in 1 and 2-star AEs - 52.27%.

Interesting dynamics can be observed in the individual segments. Among the guests from the country there was a comparable decrease in relative values for all categories of AEs - 46-49%, and in absolute values 4 and 5-star AE lost the highest number of guests - 73,913 people. In contrast, the biggest reduction in the number of foreigners was reported in 3-star AEs - almost 75%. However, in absolute terms, the number of overnight foreign tourists in 4 and 5-star AEs decreased the most - 522,785 people less than in 2019.

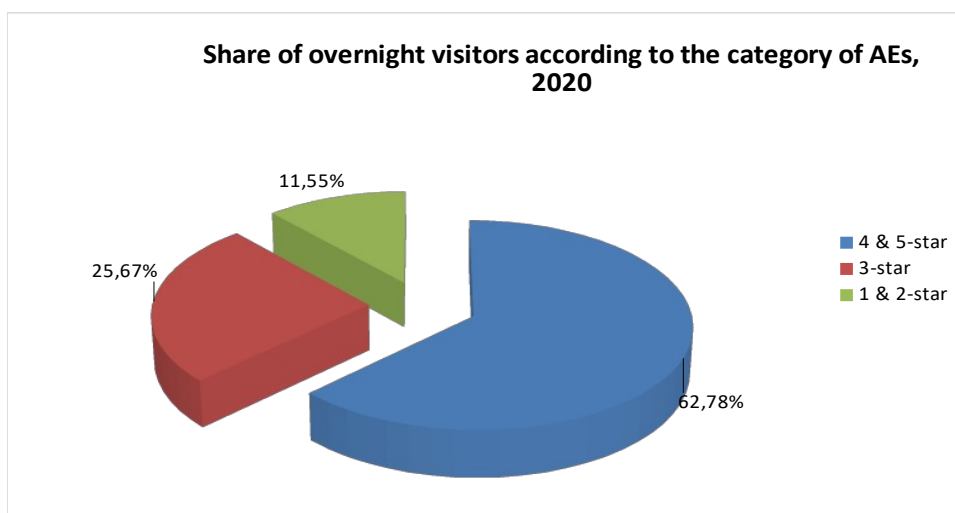
Number of overnight visitors by the category of AEs, 2019 - 2020									
Category	2019			2020			Variation '20/'19 (%)		
	Bulgarians	Foreigners	Total	Bulgarians	Foreigners	Total	Bulgarians	Foreigners	Total
4 and 5 star	159586	627400	786986	85673	178528	264201	-46.32	-71.54	-66.43
3 star	138636	132712	271348	74720	33324	108044	-46.10	-74.89	-60.18
1 and 2 star	76053	25775	101828	38883	9771	48604	-48.87	-62.09	-52.27
Total	374275	785887	1160162	199276	221623	420849	-46.76	-71.80	-63.72

Source: NCI



Source: NCI

Despite the pandemic, in the structure of the overnight tourists according to the category of AE, the preferences for middle and especially high-category AEs were preserved - 88.45% of all overnight visitors stayed 3-5 star AEs. Guests who spent the night in 4 and 5-star AEs had the largest share - 62.78%, despite a slight decline compared to 2019, when their share was nearly 68%.



Source: NCI

Overnight Stays

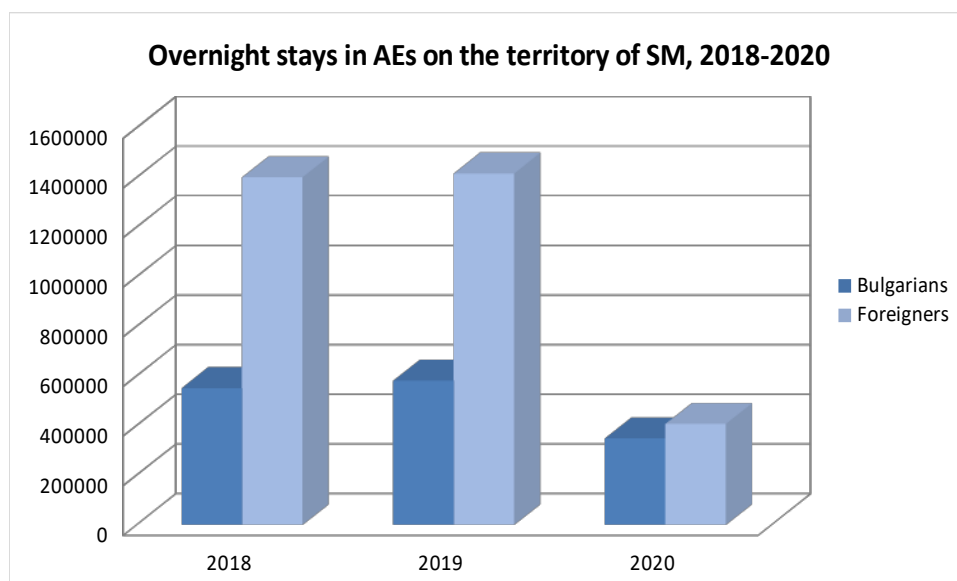
The total number of overnight stays in accommodation establishments on the territory of Sofia Municipality in 2020 amounted to 756 011⁵ - a drop of 62,12 % compared to 2019. Thus, the Covid-19 pandemic broke the upward trend in the number of overnight stays in recent years.

⁵ The information in this section belongs to the NSI and covers all categorized and functioning during the reporting period AEs with 10 and more bed places - hotels, campsites and other places for short-term accommodation (tourist and holiday villages, chalets, private rooms and apartments, recreational resorts, bungalows, guest houses, etc.).

Nationality	2018		2019		2020		Variation 20/19
	Number	Share	Number	Share	Number	Share	
Bulgarians	551224	28.23	581563	29.10	348934	46.15	-40.00
Foreigners	1401590	71.77	1416592	70.90	407077	53.85	-71.26
Total:	1952814	100	1998155	100.00	756011	100.00	-62.16

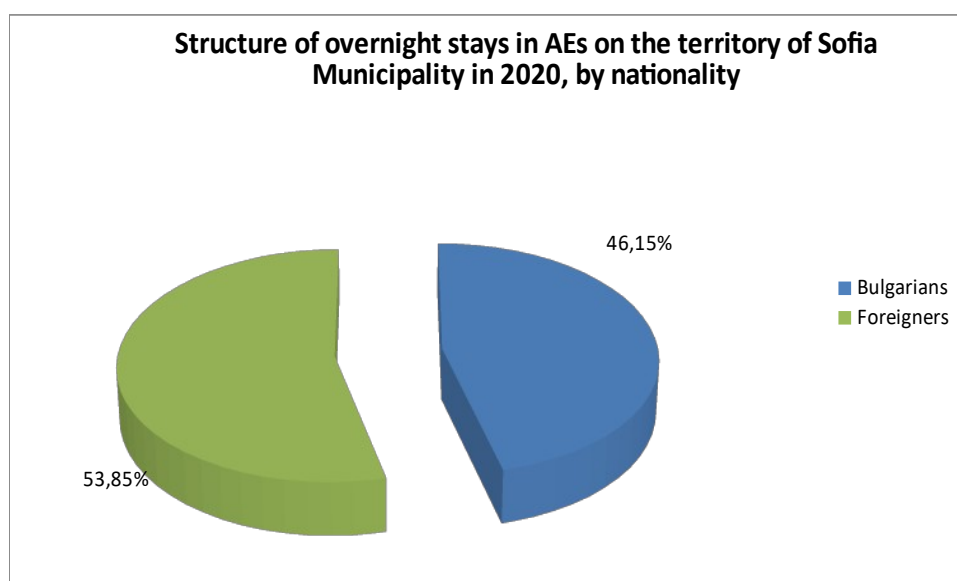
Source: NCI

The decline in 2020 affected overnight stays realized by both segments - Bulgarians and foreigners. Foreign guests spent 407,077 nights or 71.26% less than the previous year. The drop among Bulgarian guests was smaller, but still significant - 40%, with which the nights spent by Bulgarians amounted to 384,934.



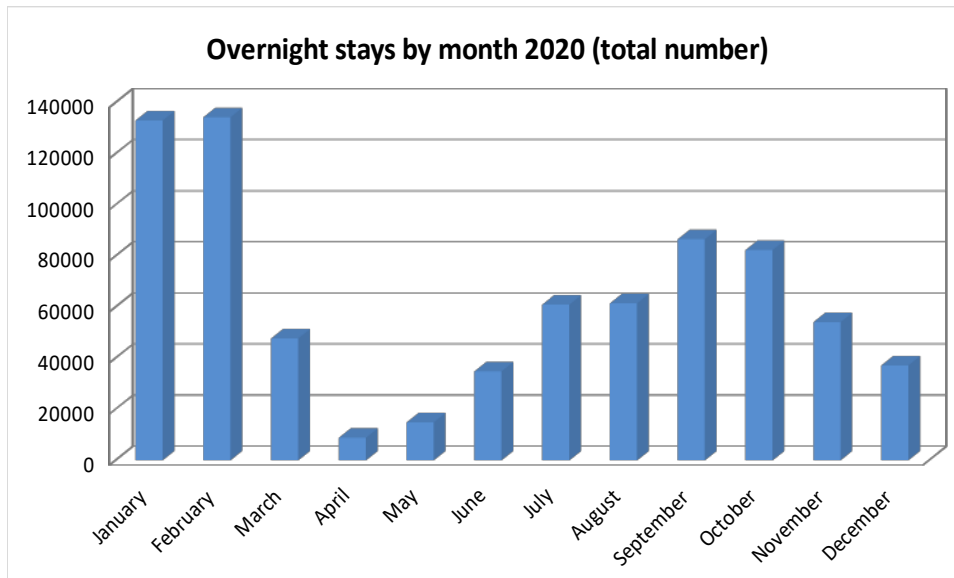
Source: NCI

In structural terms, the tendency of foreigners to generate more overnight stays remained, but the ratio changed significantly. The share of overnight stays by foreigners was 53.85% of the total number of overnight stays (compared to 70.9% in 2019), while overnight stays by Bulgarians increased as a share to 46.15%.



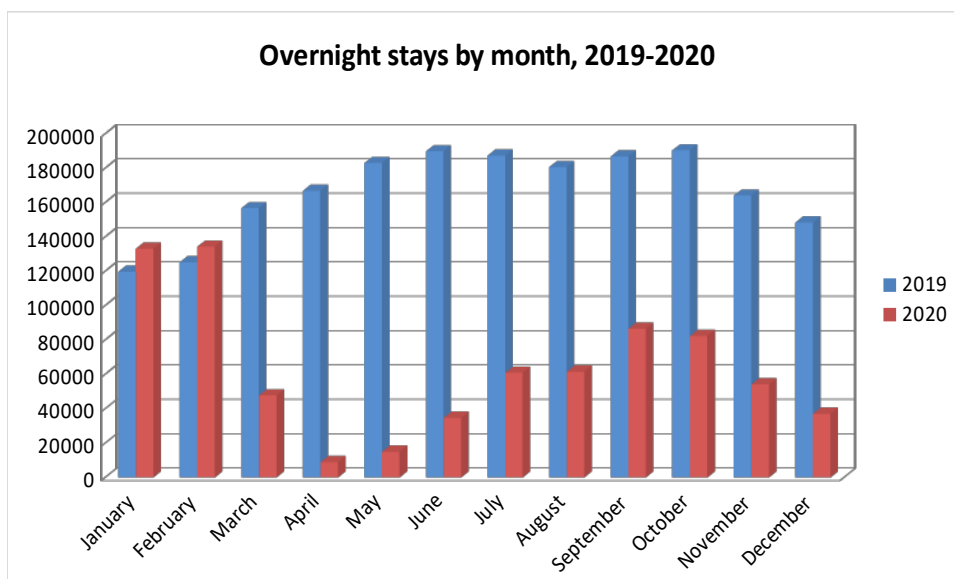
Source: NCI

The distribution of overnight stays by months in 2020 is similar to the distribution of the number of overnight guests and shows a "surprising" peak in January and February, when 133,023 and 134,257 overnight stays respectively were realized, followed by a serious drop in April with only 8,926 overnight stays and May with 14,944 overnight stays. A second, smaller peak was formed in September, which is the month with the highest number of overnight stays (86,534) after the beginning of the pandemic, followed by a second significant drop in December (37,099), associated with the second wave of virus.



Source: NCI

The comparison of the distribution of overnight stays by months in 2020 with the previous 2019 confirms the observations made regarding the overnight visitors - the year began with an increase in overnight stays - of 11.21% in January and 7.22% in February, after which due to the pandemic there was a drop during the remaining months of the year. Compared to 2019, the largest drop was in April (-94.65%) and May (-91.83%). Despite some recovery during the year, even in September, when the highest number of overnight stays was reported, their number was 53.66% less than the same month in 2019.



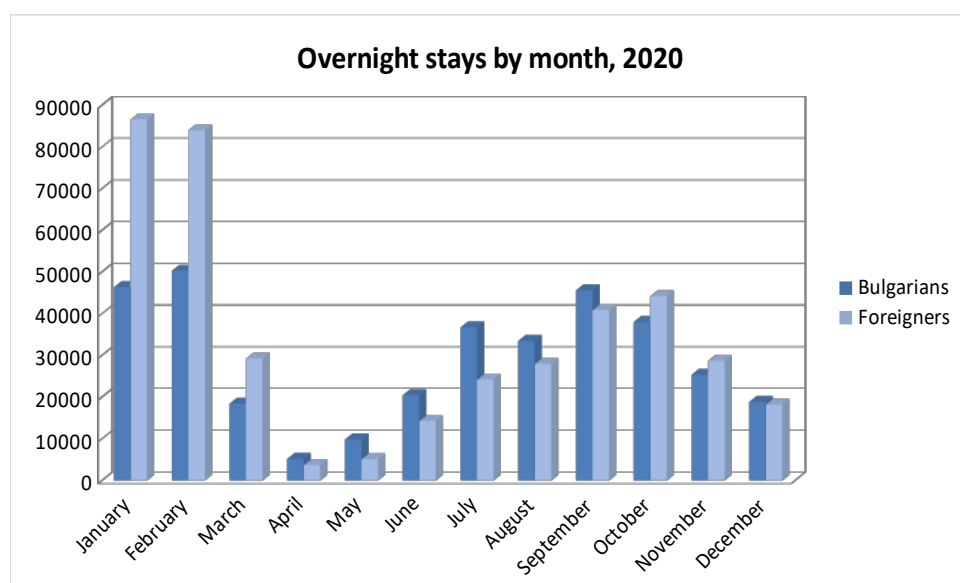
Source: NCI

The distribution of overnight stays by months reveals different dynamics during the year for Bulgarians and foreigners. The nights spent by foreigners significantly prevailed in the period before the pandemic (January-February) and partly in March, as January was the month with the largest number of nights spent by foreigners - 86,621. After the beginning of the pandemic, the peak value was in October - 44,216 overnight stays or almost twice less than in January.

Bulgarians spent more nights than foreigners in the initial months of the pandemic (April-September) and in the months with pronounced waves of the virus (December). It should be noted that in September - the month with the most overnight stays by Bulgarians after the spread of COVID 19, there was a comparable number of overnight stays (45,671) compared to the months before the pandemic - 46,402 in January and 50,266 in February.

Overnight stays by month, 2020			
Month	Bulgarians	Foreigners	Total
January	46402	86621	133023
February	50266	83991	134257
March	18403	29272	47675
April	5241	3685	8926
May	9838	5106	14944
June	20500	14260	34760
July	36775	24132	60907
August	33505	28006	61511
September	45671	40863	86534
October	38064	44216	82280
November	25364	28731	54095
December	18905	18194	37099
Total	581563	1416592	1998155

Source: NCI



Source: NCI

The distribution of the realized overnight stays according to the category of AEs shows weak specifics, mostly in decrease of the overnight stays compared to 2019.

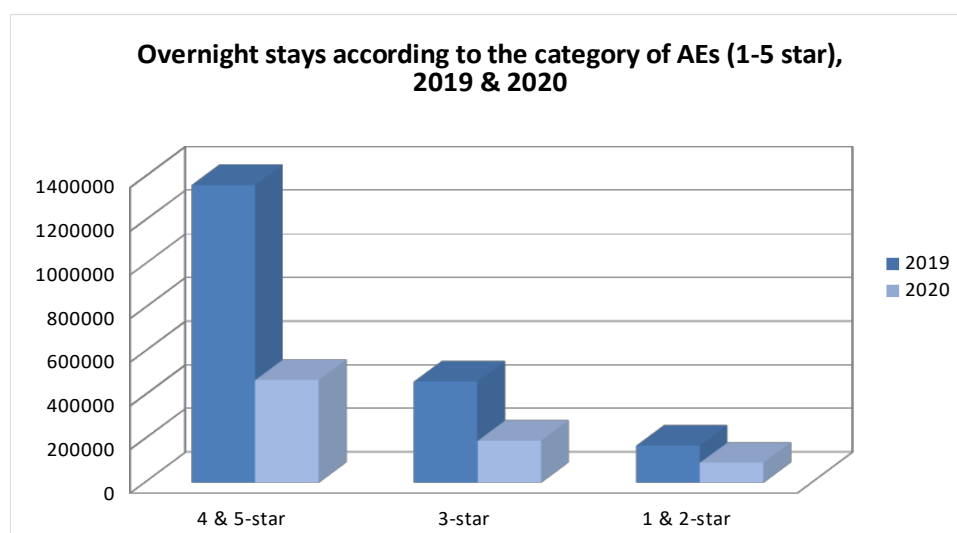
Among Bulgarians there was a relatively even outflow in overnight stays, as all categories generated 36-43% fewer overnight stays. As an absolute value, the largest decrease was in 3-star AEs, where overnight stays decreased by 93,328.

Among foreigners, there was a decrease of about 72% of overnight stays in 3-5-star AEs. The size of the drop was relatively smaller in the low-category AEs, but it also reached 59%.

Overnight stays according to the category of AEs, 2019 - 2020									
Category	2019			2020			Variation '20/'19 (%)		
	Bulgarians	Foreigners	Total	Bulgarians	Foreigners	Total	Bulgarians	Foreigners	Total
4 & 5 star	241931	1122135	1364066	153769	317932	471701	-36.44	-71.67	65.42
3 star	214758	249847	464605	121430	70888	192318	-43.46	-71.63	58.61
1 & 2 star	124874	44610	169484	73735	18257	91992	-40.95	-59.07	45.72
Total	581563	1416592	1998155	348934	407077	756011	-40.00	-71.26	62.16

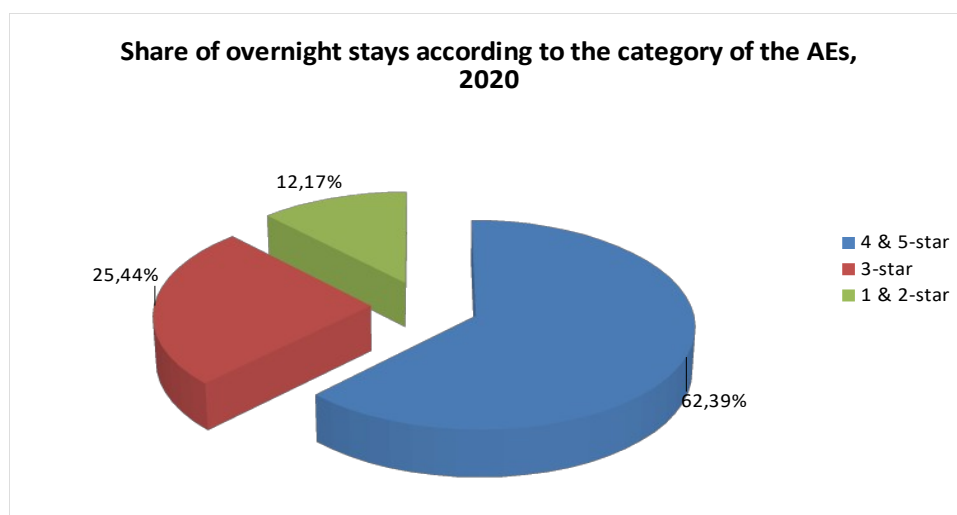
Source: NCI

In general, the most affected by the pandemic were 4-5 star AEs, where 892,365 fewer overnight stays were realized compared to 2019 or there was a decrease of 65%.



Source: NCI

The structure of overnight stays by category of accommodation establishments is similar to that in 2019, with some changes occurring as a result of different rates of decline in different categories of AEs. The nights spent in middle and high-category AEs continued to prevail - 88.37% of all nights were realized in 3-5-star AEs (compared to 91.52% in 2019). Despite the decline of 6 points, again the most significant was the share of overnight stays in 4 and 5-star AEs, which accounted for over 62% of all overnight stays. As a share, the nights spent in 1 and 2-star establishments increased the most - from 8.48% to 12.17%.



Source: NCI

TOURIST TAX REVENUE FOR 2020

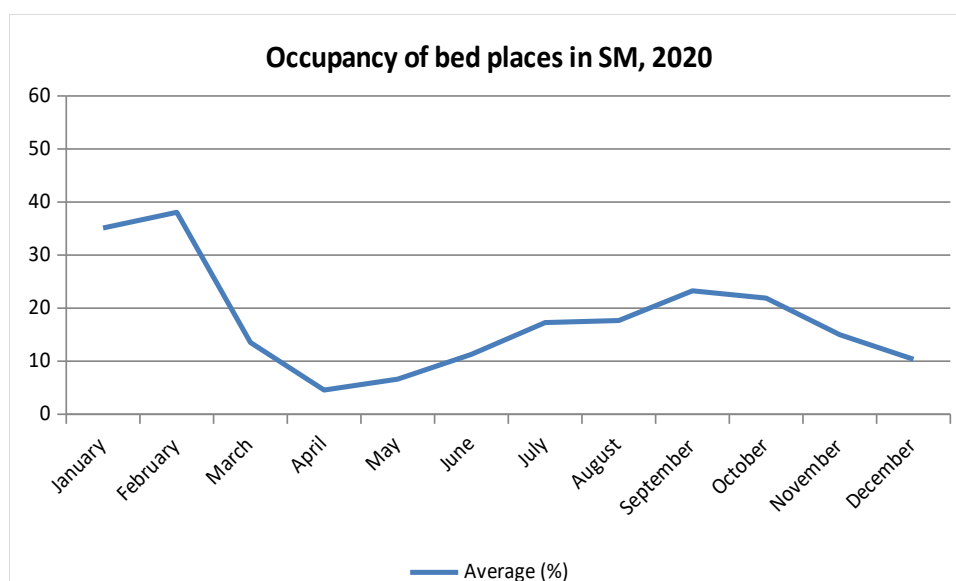
According to the Municipal Revenues Department of Sofia Municipality, the amount of tourist tax collected in 2020 was BGN 963 961, which includes both tax due for 2020 and unpaid liabilities from previous years. The decrease compared to 2019, when the paid tax was BGN 2,212,552, exceeds 56%.

Occupancy of Bed Places

The average annual occupancy of the total number of bed places in Sofia in 2020 decreased significantly and from 44.95% in 2019 dropped to 18.99%. The change in the average occupancy by months in 2020 corresponds to the general trend for the key demand indicators. The initial months (January and February) began with an increase in average monthly occupancy compared to the previous year, then, with the declaration of the state of emergency and the introduction of restrictions on travel and tourism, occupancy collapsed to only 4.56% in April and 6.62% in May. Later in the year there was some recovery, but even during the month with the highest occupancy - September (23.26%), it remained more than 2 times lower than the same period in 2019.

Average Occupancy by Months, 2019-2020 (in %)		
Month	2019	2020
January	32	35.1
February	36.87	38.06
March	41.51	13.52
April	45.61	4.56
May	48.04	6.62
June	51.46	11.29
July	49.27	17.28
August	47.42	17.66
September	50.88	23.26
October	50.48	21.89
November	45.41	14.98
December	39.72	10.36
Average	44.95	18.99

Source: NCI

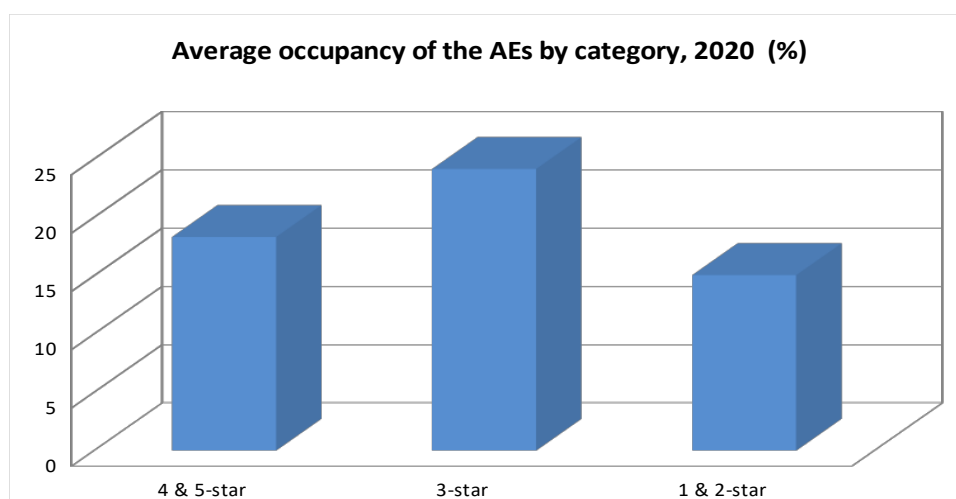


Source: NCI

Regarding the category of AEs, there was a reduction of the difference in average occupancy between the different category levels and if in 2019 the low-category AEs (1-2 star) were with average occupancy more than 2 times lower than the other categories, then in 2020 it was comparable to those of AEs with 4 and 5 stars - 15.05% for 1 and 2 stars and 18.32% for 4 and 5 stars respectively. In 2020, the occupancy of 3-star AEs was the highest - 24.15%.

Average annual occupancy of AEs by category, 2020			
Category	Number of bed nights	Overnight stays	Average occupancy (%)
4 & 5 stars	2574290	471701	18.32
3 stars	796245	192318	24.15
1 & 2 stars	611347	91992	15.05
Average	3981882	756011	18.99

Source: NCI



Source: NCI

POSITION OF SOFIA IN BULGARIA'S TOURISM

As a typical urban destination, Sofia is among the most affected destinations within the country and in 2020 lost some of its positions in the national tourism industry.

In terms of supply, 2020 is associated with a minimal increase in the share of Sofia. According to NSI data, 3.95% of the accommodation establishments in the country operated in the capital with 4.76% of the bed capacity in Bulgaria, compared to 3.5% and 3.7% in 2019 respectively. Although the share of overnight visitors in Sofia in the total number of overnight visitors in the country decreased from 14.17% to 10.46%, it still significantly exceeded the share of supply. The share of overnight international visitors remained comparable to the previous year - 18.85%, while the share of overnight Bulgarian visitors decreased by 2 points and in 2020 it was 7%.

The share of realized overnight stays in the total number of realized overnight stays in the country is 6.32% (compared to 7.36% in 2019), including 4.77% of overnight stays by Bulgarians and 8.74% by foreigners

The average length of stay of tourists in Sofia marked a minimal increase against the background of a minimal decline for the country - 1.8 nights for Sofia and 2.97 overnight stays for the country in 2020 compared to 1.72 nights and 3.32 nights in 2019 respectively. .

The decrease in the number of overnight stays had a negative impact on the efficiency and occupancy of the bed capacity, which in 2019 was ahead of the average for Bulgaria, falling to 18.99% compared to 25.16% for the country. The economic performance of AEs in Sofia also deteriorated, but still remained above the national average. The average income from an overnight stay in Sofia was BGN 78 (compared to BGN 54 for the country), and the average annual income from 1 bed place was BGN 4,402 (compared to BGN 2,292 for the country).

Indicator	2020		
	Country	Sofia (capital)	Share of Sofia (%)
Number of establishments	3317	131	3.95
Number of Bed places	281666	13406	4.76
Bed nights	47573284	3981882	8.37
Number of overnight stays - total	11968483	756011	6.32
Bulgarians	7312194	348934	4.77
foreigners	4656289	407077	8.74
Number of overnight visitors - total	4023763	420849	10.46
Bulgarians	2847984	199226	7.00
foreigners	1175779	221623	18.85
Average length of stay	2.97	1.80	
Occupancy (bed places)	25.16	18.99	
Revenue from overnight stays - total	645544880	59008394	9.14
Bulgarians	330027013	18454709	5.59
foreigners	315517867	40553685	12.85
Average revenue from 1 overnight stay	54	78	
Bulgarians	45	53	

foreigners	68	100
Average revenue from 1 person	160	140
Bulgarians	116	93
foreigners	268	183
Average revenue from 1 bed place	2292	4402

Key Tourism Markets

Travel opportunities in general and in addition to the requirements for travelers to / from Bulgaria, which individual national governments introduced for their residents in the course of 2020, made some changes in relation to the main generating markets for Sofia. Traditional and leading markets such as Spain lost significant positions, while others, such as China and Hungary, fell out of the TOP 20 markets altogether. At the same time, countries such as Albania and the Czech Republic appeared in the ranking, as previously were not among the top 20 markets for Sofia.

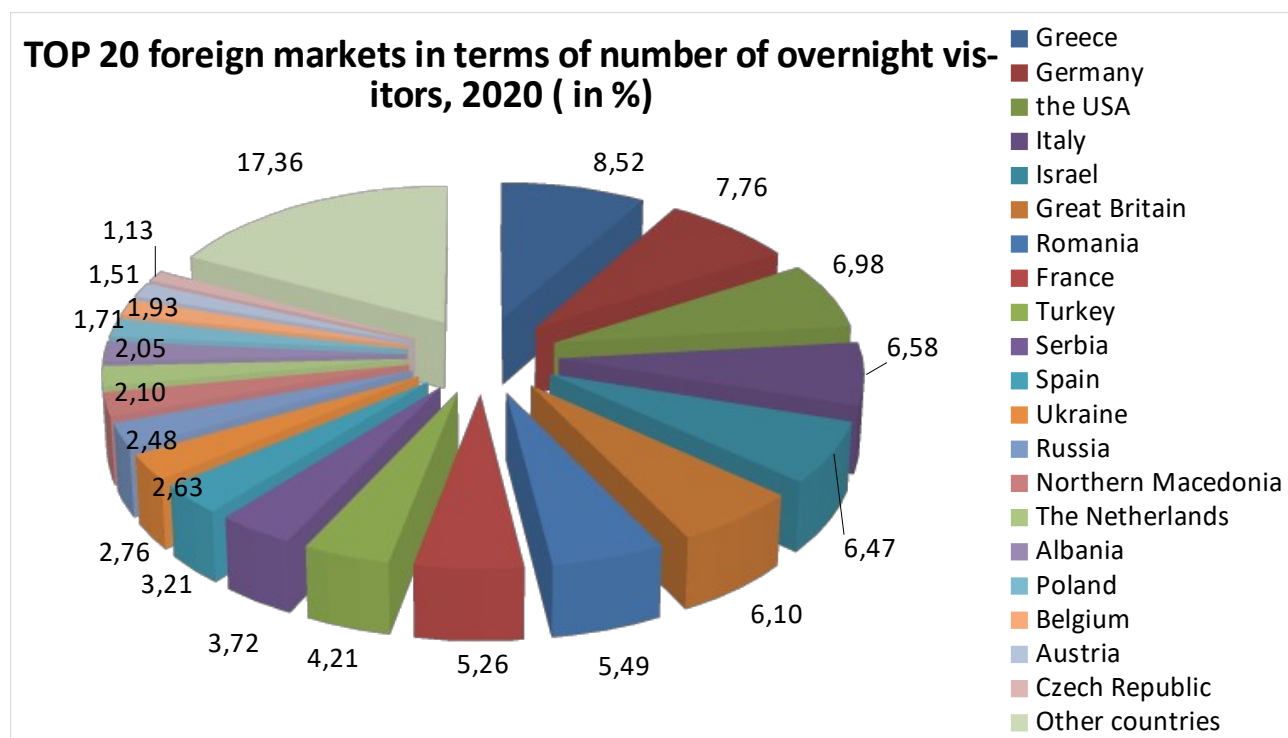
Most tourists in 2020 came from Greece and Germany - 16,908 and 15,411 people respectively. Surprisingly, the third most important market was the United States with almost 7% of all overnight visitors (13,857 people), and Italy and Israel also ranked in the TOP 5.

TOP 20 - Ranking of foreign markets according to the number of overnight visitors, 2020

	Nationality	2020	Share(all)
1	Greece	16908	8.52
2	Germany	15411	7.76
3	USA	13857	6.98
4	Italy	13063	6.58
5	Israel	12839	6.47
6	Great Britain	12101	6.10
7	Romania	10897	5.49
8	France	10450	5.26
9	Turkey	8360	4.21
10	Serbia	7386	3.72
11	Spain	6374	3.21
12	Ukraine	5480	2.76
13	Russia	5222	2.63
14	Northern Macedonia	4923	2.48
15	The Netherlands	4167	2.10
16	Albania	4078	2.05
17	Poland	3836	1.93
18	Belgium	3403	1.71
19	Austria	2996	1.51
20	Czech Republic	2251	1.13
21	Other countries	34458	17.36
	Total:	198490	100.00

Source: USTI

The structure of the international tourist flow also underwent some changes in the direction of defragmentation of the tourism markets. The countries from the TOP 20 provided almost 83% of all tourists, and over 60% of the overnight visitors were generated by the leading 10 markets. However, there was still no clear dominant market.



Source: USTI

Despite the exit of Great Britain from the EU, the countries of the Union remained the leading generating market for Sofia and in 2020 provided 104,323 tourists - more than half (54.74%) of the international visitors of the capital. Within the EU, there were significant differences between various countries. Interest in Sofia remained higher in traditional markets for Bulgaria and Sofia such as Germany, Italy and France and neighboring countries (Greece, Romania), while in the Baltic states and some Central European countries (Slovakia, Slovenia) and Scandinavia (Finland) was very limited.

Overnight tourists in Sofia from the EU member states, 2020 (number)

Country	2020
Austria	2996
Belgium	3403
Germany	15411
Greece	16908
Denmark	1220
Estonia	363
Ireland	1526
Spain	6374
Italy	13063
Cyprus	1033
Latvia	511
Lithuania	557
Luxembourg	132

Malta	439
The Netherlands	4167
Poland	3836
Portugal	1168
Romania	10897
Slovakia	814
Slovenia	724
Hungary	1736
Finland	613
France	10450
Croatia	1675
Czech Republic	2251
Sweden	1551
Guests from the EU:	104323⁶
Share of foreign guests (%):	54.74

Source: USTI

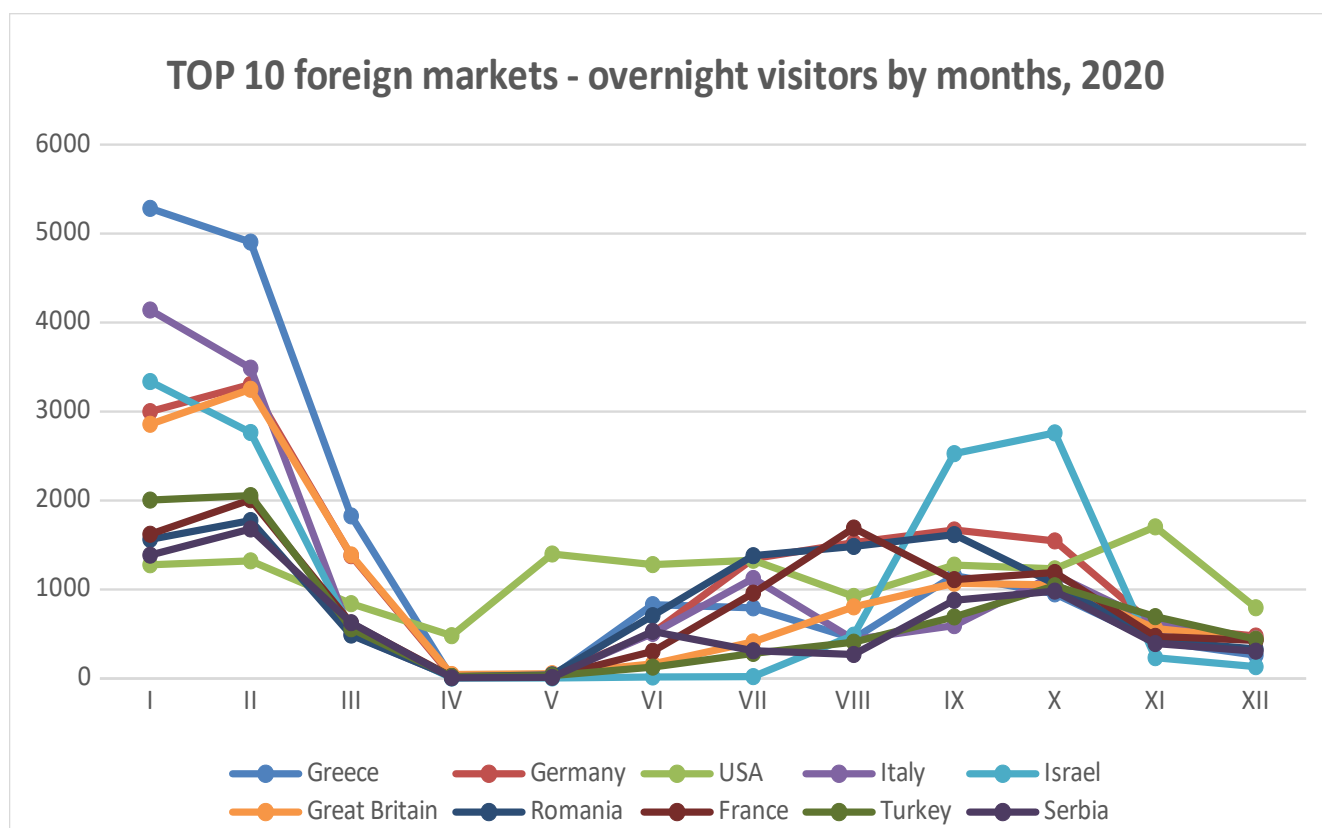
Given the strong restrictions on intercontinental travel during the pandemic, distant markets showed poor results and provided only 9.6% (19,025 people) of overnight international visitors in Sofia. Among the distant markets, the United States stood out - guests from this market made up almost 73% of all tourists from distant markets and almost 7% of all foreign visitors in the capital.

Market	2020
Australia	756
Brazil	613
India	816
Canada	787
China	1103
United States	13857
Japan	1093

Source: USTI

The distribution of overnight visitors within the year followed the course of the pandemic. The number of overnight visitors from the top 10 markets clearly showed two drops related to the two waves of the virus during the months of April-May and November-December. It is worth noting the relatively higher number of tourists from the United States during both waves, as well as a more complete recovery of the tourists of the Israeli market in September-October.

⁶ The total number also includes 505 tourists who are declared in the USTI with country of origin "European Union"



The largest number of overnight stays of tourists from foreign markets was realized by the guests from the USA - 36,071, which was significantly ahead of the second largest market of overnight stays - Israel (32,916 overnight stays). Visitors from Germany and Italy spent 31,049 and 29,880 nights respectively, and ranked 3rd and 4th in the TOP 20 countries according to the number of overnight stays. Greece, which was number 1 in the number of overnight visitors, was only in 5th place with 29,211 overnight stays.

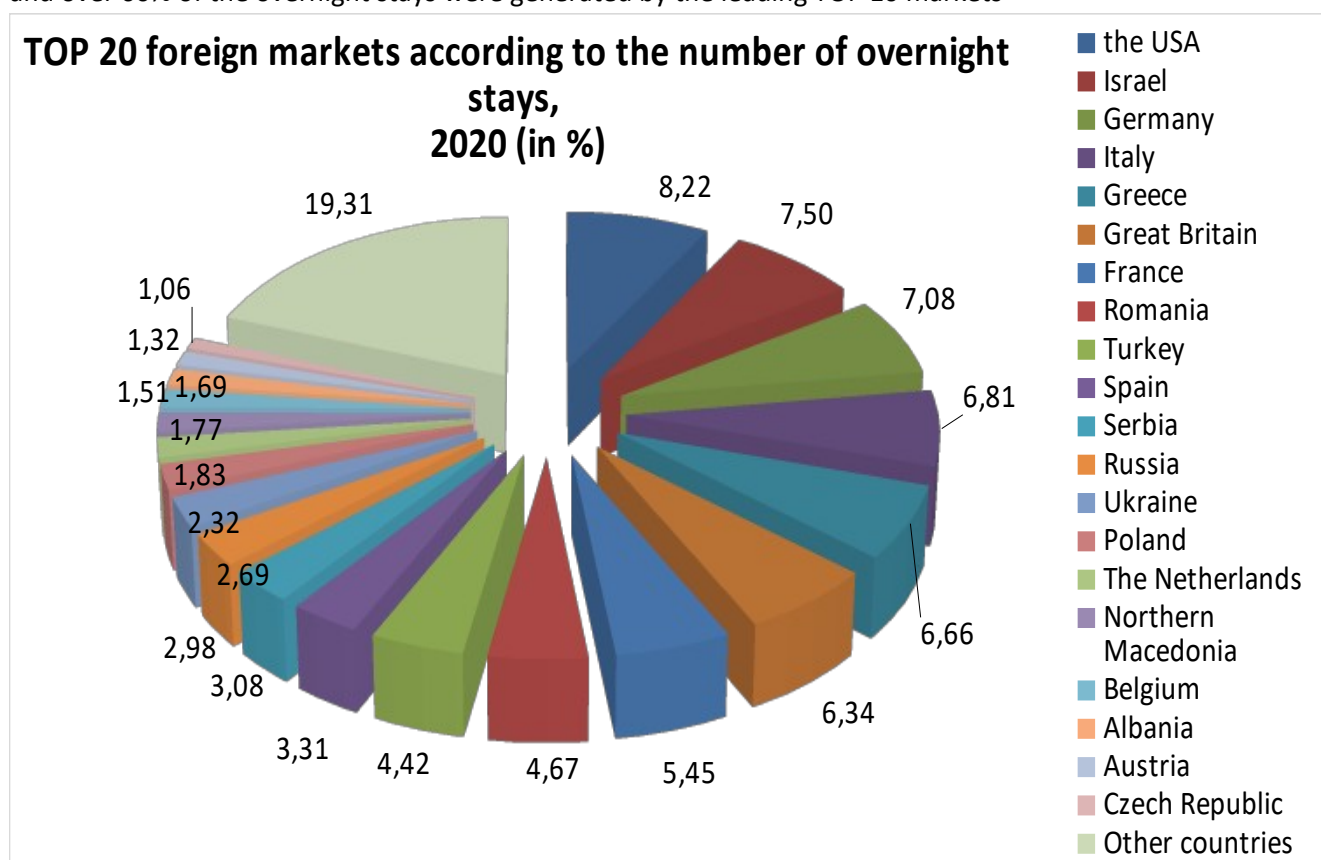
TOP 20 - Ranking of foreign markets according to the number of overnight stays, 2020

	Nationality	2020	Share '20
1	The USA	36071	8.22
2	Israel	32916	7.50
3	Germany	31049	7.08
4	Italy	29880	6.81
5	Greece	29211	6.66
6	Great Britain	27805	6.34
7	France	23932	5.45
8	Romania	20512	4.67
9	Turkey	19404	4.42
10	Spain	14506	3.31
11	Serbia	13521	3.08
12	Russia	13058	2.98
13	Ukraine	11788	2.69
14	Poland	10174	2.32
15	The Netherlands	8048	1.83
16	Northern Macedonia	7779	1.77

17	Belgium	7405	1.69
18	Albania	6619	1.51
19	Austria	5808	1.32
20	Czech Republic	4645	1.06
21	Other countries	84722	19.31
	Total number:	438853	100.00

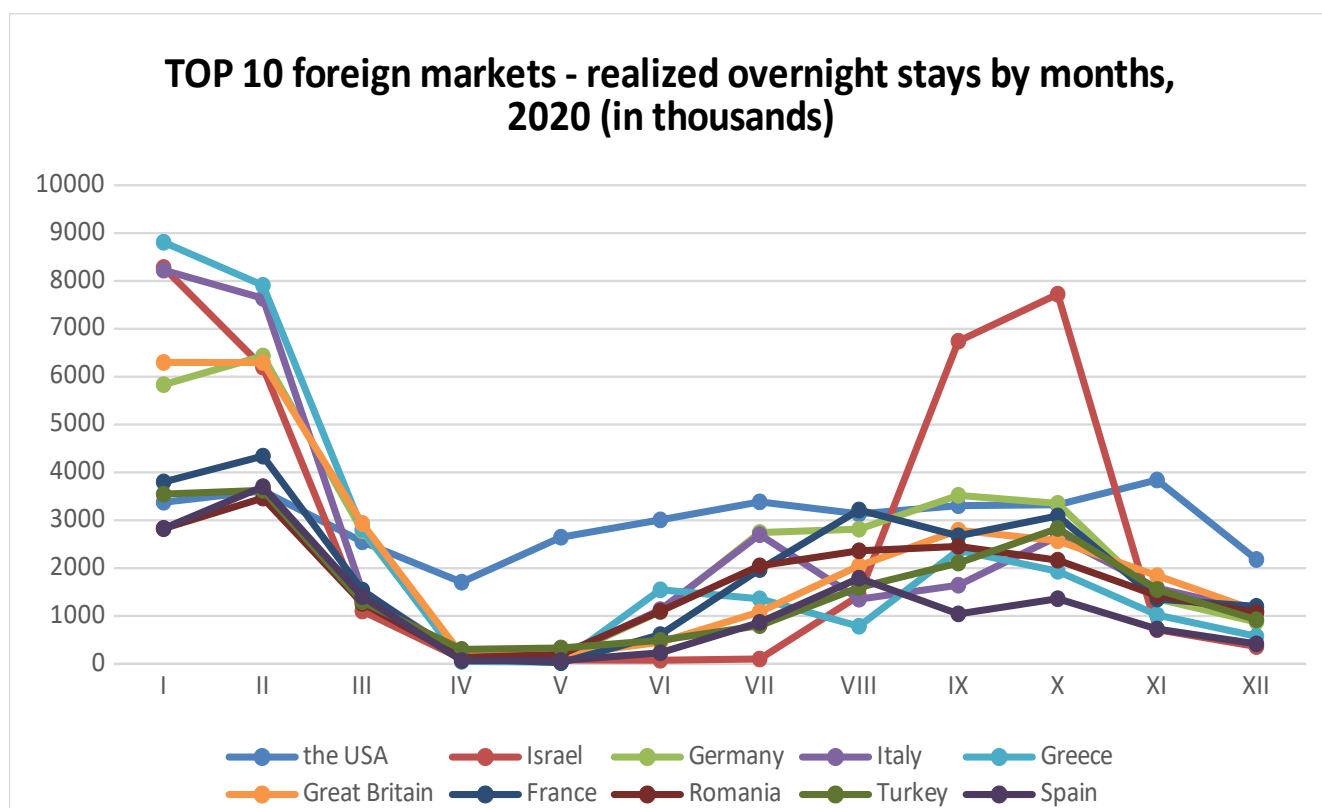
Source: USTI

The structure of the realized overnight stays according to the nationality of the visitors does not show a clear, dominant market. At the same time, there are some signs of consolidation of the traditionally fragmented structure of realized overnight stays - the countries from the TOP 20 realized over 80% of all overnight stays, as and over 60% of the overnight stays were generated by the leading TOP 10 markets



Source: USTI

The distribution of overnight stays by months complements the overall picture for 2020. Here, too, there was a serious drop among the TOP 10 markets in April-May, as well as during the second wave of the pandemic in November and December. The even distribution of overnight stays of guests from the USA is impressive, even in the months of general decline. Also noteworthy are the higher values of overnight stays of guests from Israel in September and October - the second peak of the year (after the one in January).



Source: USTI

One of the few positive effects of the pandemic is the extension of the average length of stay of foreign tourists in Sofia, as in 2020 it exceeded 2 nights for the first time and according to USTI data was 2.21 nights. Among the TOP 20 markets, the highest average duration was observed with visitors from Poland (2.65 nights), the USA (2.6 nights) and Israel (2.56 nights), and the lowest - with tourists from Northern Macedonia and Albania, 1.58 and 1.6 overnight stays respectively.

In general, for visitors from neighboring countries, the length of stay remained below the average level for Sofia, with the only exception being visitors from Turkey with an average stay of 2.32 nights. Among the other markets, it is worth noting the relatively shorter length of stay of tourists from a leading market such as Germany - 2.01 nights, as well as the longer length of stay of guests from Russia (2.5 nights).

CATERING AND ENTERTAINMENT ESTABLISHMENTS

In 2020, 2,883 catering and entertainment establishments operated on the territory of Sofia Municipality, which was 4.8% less than in 2019. The decrease in the number of establishments did not affect the total number of seats, as the functioning establishments had 234,003 indoor and outdoor seats (compared to 234,962 seats in 2019).

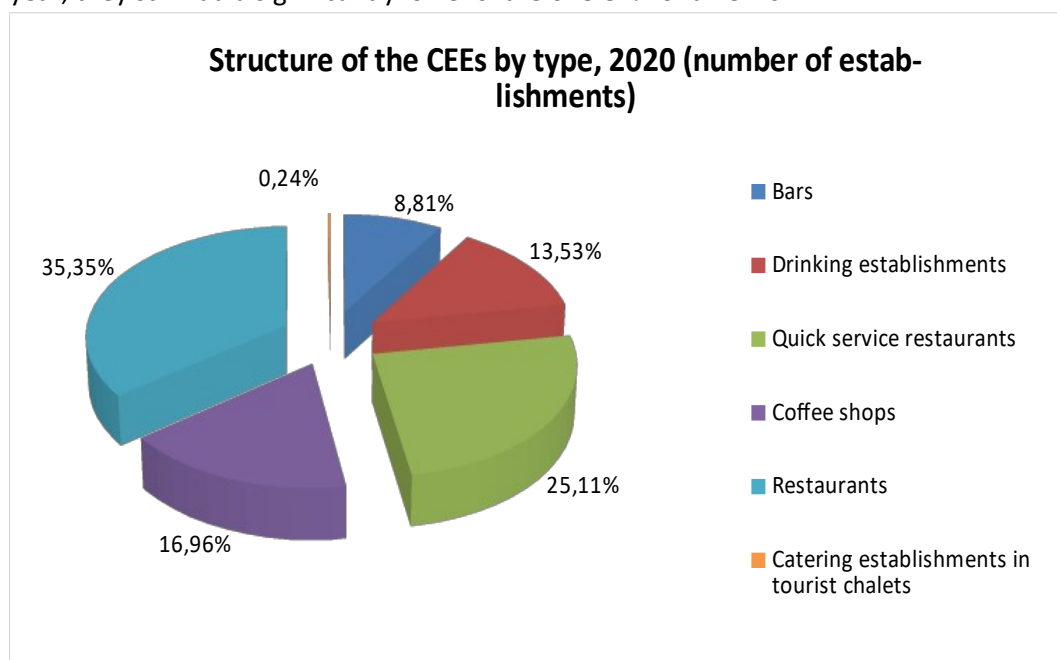
In 2019 on the territory of Sofia Municipality operated 3 027 catering and entertainment establishments categorized by the Mayor or the Minister of Tourism with a total of 234 962 number of seats.

Type	Number of CEEs	Share of all CEEs (%)	Capacity		
			Indoor seats	Outdoor seats	Total
Bars	254	8.81	16055	4171	20226
Drinking establishments	390	13.53	11453	7689	19142
Quick service restaurants	724	25.11	27375	16170	43545
Coffee shops	489	16.96	14494	9335	23829
Restaurants	1019	35.35	77604	49247	126851
Catering establishments in tourist chalets ⁷	7	0.24	280	130	410
Total	2883	100.00	147261	86742	234003

Source: Sofia Tourism Administration

Restaurants continued to be of leading importance in the structure of the CEEs. In 2020, their number increased by 17 to 1,019 restaurants, and their share increased to 35.35% of all CEEs. Although they registered a drop in their share by 1 point, the quick service restaurants continued to occupy the second place in terms of number among CEEs - 724 restaurants and a share of 25.11%.

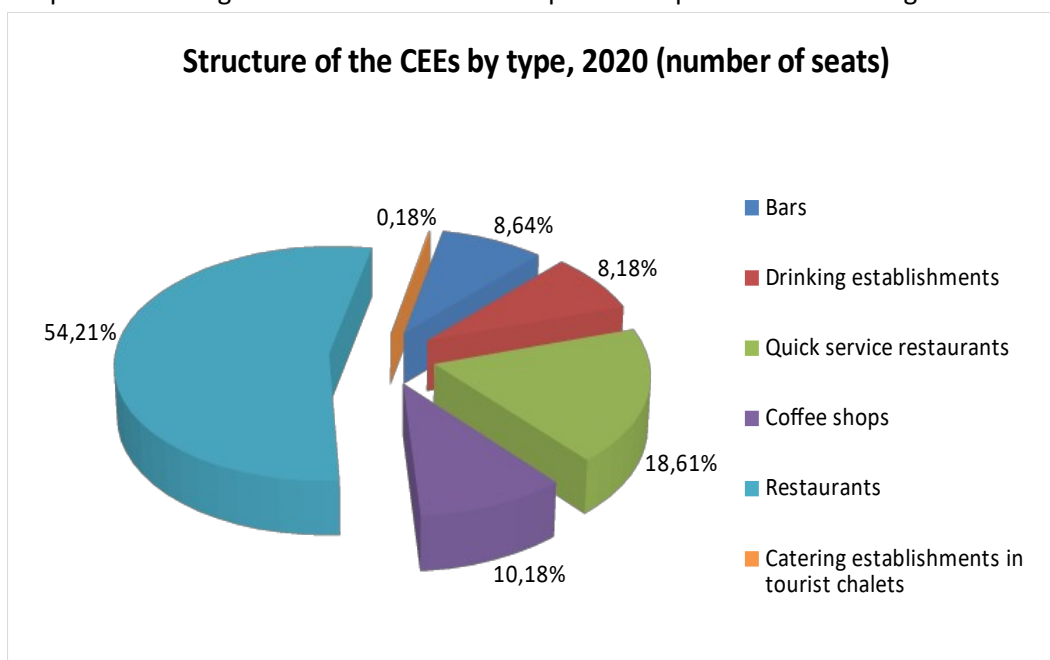
During the year there was a decrease in the number of coffee shops and drinking establishments and they were 489 and 390 or 16.86% and 13.53% respectively. Although the number of bars increased by 31 during the year, they still had a significantly lower share of 8.81% of all CEEs.



Source: Sofia Tourism Administration

⁷Including Tourist canteen, Tourist canteen with waiter service, and Tourist buffet.

The share of restaurants was even more serious in terms of the number of seats, as more than half of the available seats in CEEs were in restaurants (54.21%). Quick service restaurants had a significantly smaller share - 18.61%. Despite the differences in the number of establishments, in terms of seats in them, bars, coffee shops and drinking establishments had a comparable importance in the range of 8-10%.



Source: Sofia Tourism Administration

With regard to the category, 1-star CEEs dominated, as in this category there were 2,422 establishments or 84% of all CEEs. In 2020, however, only this category registered a decrease in the number of establishments and seats in them, while in all other categories there was an increase. It is most significant in the case of 4-star CEEs, whose number doubled to 54 establishments, and 5-star CEEs where the increase was from 16 to 26 establishments.

Category	Number of CEEs	Share of all CEEs	Indoor seats	Capacity	
				Outdoor seats	Total number of seats
*****	26	0.90	2233	724	2957
****	54	1.87	4999	1633	6632
***	139	4.82	10721	4061	14782
**	235	8.15	20164	10673	30837
*	2422	84.01	108864	69521	178385
3 edelweiss	2	0.07	100	80	180
2 edelweiss	1	0.03	48	0	48
1 edelweiss	4	0.14	132	50	182
Total	2883	100.00	147261	86742	234003

Source: Sofia Tourism Administration

MUSEUMS

Similar to all tourism service providers, museums also suffered severely in 2020, and for significant periods of time during the year either operated with limited capacity or were not open to the public at all. According to NSI data on the territory of Sofia Municipality in 2020 the visits to 18 museums were recorded and their number was 273 159, which was a significant decrease compared to 2019, when the visits were 866 956 with the same number of museums.

Sofia Tourism Administration does not have complete information regarding the visitor flow in the museums on the territory of the capital. The statistics of visits to different museums are different, making it difficult to collect, process and summarize data.

According to data provided by museums, more 637 000 people visited them in 2020.

Museum	Bulgarians	Foreigners	Total
National History Museum			
National History Museum	14625	3296	17921
Boyana church	7956	8221	16177
Sofia History Museum			
Sofia History Museum	7802	3687	11489
St.Sophia Basilica Archeological Level	2841	4045	6886
Ancient Serdica Archaeological Complex	1325	690	2015
The triangular tower	3984	162	4146
Western Gate Archaeological Park	614	21	635
Tomb of Prince Alexander I Battenberg	1899	460	2359
National Museum of Military History - Sofia	33708	4375	38083
National Archaeological Institute with Museum at BAS	2599	2671	5270
National Art Gallery	41255	5719	46974
National Polytechnic Museum	3429	71	3500
National Museum of Natural History	21569	1675	23244
National Ethnographic Museum	2349	724	3073
National Anthropological Museum - BAS	1535	21	1556
Earth and Man National Museum	14186	400	14586
National Literary Museum			9249
Vrana Park-Museum	65000	1500	66500
Sofia Zoo			278579
Museum of Illusions	40100	4436	44536
Boris Christoff Museum	1457	200	1657
Serdica Gallery	1649	51	1700
Muzeiko	35584	2100	37684
TOTAL			637,819

Source: Sofia Tourism Administration

Age structure of the visitors to museums and attractions in Sofia, 2020				
	Children under 18	Students	Adults	Total
National History Museum				
National History Museum	5412	1756	10753	17921
Boyana church	1647	1519	1301	16177
Sofia History Museum *				
Sofia History Museum (Banski Square)	1750	496	5556	7 802
St.Sophia Basilica Archeological Level	521	157	2163	2841
Ancient Serdica Archeological Complex	329	124	872	1325
The triangular tower	760	216	3008	3964
Western Gate Archeological Park	99	29	486	614
Tomb of Prince Alexander I Battenberg	923		976	1899
National Archaeological Institute with Museum at BAS	1380		3890	5270
National Gallery	8 455	13 153	25 366	46 974
National Polytechnic Museum	1246	88	2166	3500
National Ethnographic Museum	753	96	2224	3073
National Anthropological Museum - BAS	747		809	1556
Earth and Man National Museum	2635	660	2687	14586
Sofia Zoo**	88056	175986		264042
Museum of Illusions	11959	8462	24115	44536
Boris Christoff Museum	392	165	1100	1657
Serdica Gallery	85	425	1190	1700
Muzeiko	18779	909	17996	37684
Vazrazhdane AquaPark	14399	25190		39589

* Note: only for Bulgarian visitors

**Note.: without visitors with group tickets

The comparison of the visits with the previous year at all major museums shows a significant decrease in the number of visitors, which reached 87% at the National Archaeological Institute with Museum at BAS and 81% at the National History Museum. An increase in the number of visitors was observed only at the National Anthropological Museum - BAS, but with a very low absolute number of visitors.

Museum	2019	2020	20/19
National History Museum			
National History Museum	94045	17921	-80.94
Boyana church	70650	16177	-77.10
Sofia History Museum			
Sofia History Museum	40014	11489	-71.29
St.Sophia Basilica Archeological Level	34262	6886	-79.90
The triangular tower	6650	4146	-37.65
National Museum of Military History - Sofia	123478	38083	-69.16
National Archaeological Institute with Museum at BAS	41280	5270	-87.23
National Art Gallery	164,250	46974	-71.40
National Polytechnic Museum	13793	3500	-74.62

National Museum of Natural History	61431	23244	-62.16
National Ethnographic Museum	9659	3073	-68.19
National Anthropological Museum - BAS	1,439	1556	8.13
Earth and Man National Museum	72,792	14586	-79.96
Sofia Zoo	373,152	278579	-25.34
TOTAL	1,106,895	471,484	-57.40

Source: Sofia Tourism Administration

Prices of some tourist services and products

The table below shows the prices of some products and services in Sofia compared to the prices in other European capitals⁸.

Compared to 2019, the prices of most of the observed goods and services in Sofia rose but the capital was still rather at an average / below average price level compared to the listed destinations.

Average prices of some services and products in some European capitals in 2020 (in euro)

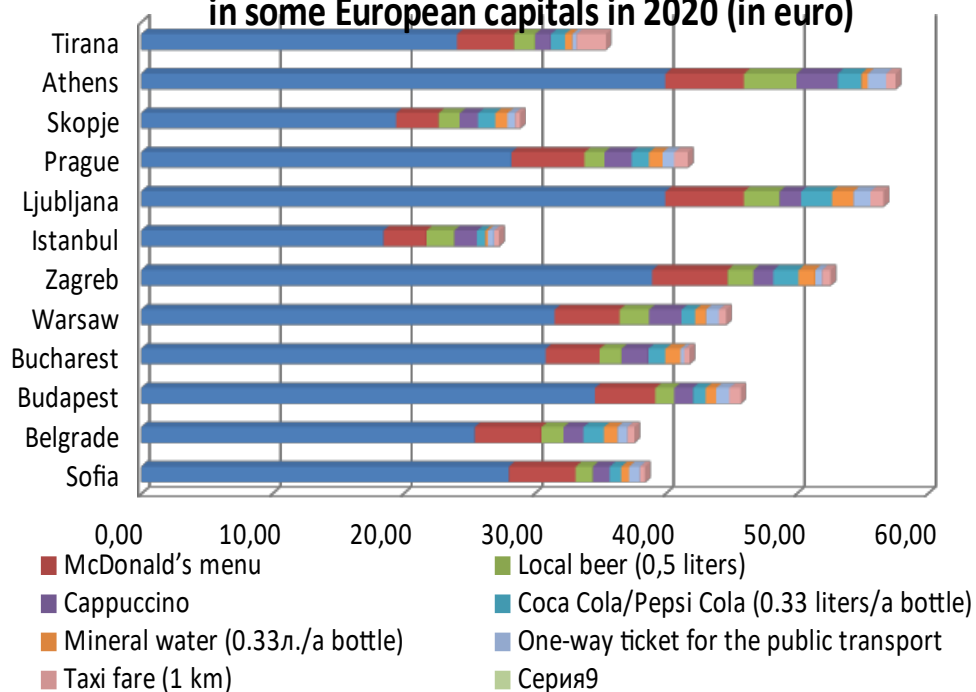
	Sofia	Belgrade	Budapest	Bucharest	Warsaw	Zagreb	Istanbul	Ljubljana	Prague	Skopje	Athens	Tirana
Lunch/dinner in a standard restaurant – one meal	6.12	5.94	5.77	7.20	6.31	7.17	3.96	10.00	5.58	4.05	10.00	4.82
Lunch/dinner for two in a standard restaurant – three-course meal	28.05	25.44	34.62	30.87	31.55	38.99	18.47	40.00	28.25	19.45	40.00	24.10
McDonald's menu	5.10	5.09	4.62	4.12	4.96	5.75	3.30	6.00	5.58	3.24	6.00	4.34
Local beer (0,5 liters)	1.30	1.70	1.44	1.65	2.25	1.97	2.11	2.70	1.51	1.62	4.00	1.61
Cappuccino	1.30	1.51	1.41	2.05	2.47	1.53	1.75	1.66	2.09	1.40	3.14	1.20
Coca Cola/Pepsi Cola (0.33 liters/a bottle)	0.88	1.56	0.99	1.31	1.05	1.91	0.61	2.35	1.32	1.32	1.80	1.09
Mineral water (0.33л./a bottle)	0.60	1.02	0.79	1.15	0.81	1.26	0.22	1.63	1.04	0.92	0.50	0.55
One-way ticket for the public transport	0.82	0.76	1.01	0.29	0.99	0.53	0.46	1.30	0.89	0.57	1.40	0.32
Taxi fare (1 km)	0.41	0.56	0.87	0.41	0.56	0.66	0.41	1.00	1.04	0.41	0.74	2.25

⁸ Source: www.numbeo.com/cost-of-living/

Average prices of some services and products in some European capitals in 2020 (in euro)

The chart displays the average prices of various services and products in 12 European capitals in 2020. The x-axis represents the price in euros, ranging from 0.00 to 60.00. The y-axis lists the cities. Each bar is composed of segments representing different items: McDonald's menu (red), Local beer (0.5 liters) (green), Cappuccino (purple), Coca Cola/Pepsi (0.33 liters/bottle) (teal), Mineral water (0.33L/bottle) (orange), One-way ticket for public transport (light blue), and Taxi fare (1 km) (pink).

City	McDonald's menu	Local beer (0,5 liters)	Cappuccino	Coca Cola/Pepsi (0.33 liters/a bottle)	Mineral water (0.33л./a bottle)	One-way ticket for the public transport	Taxi fare (1 km)
Tirana	10.00	1.00	1.00	1.00	1.00	25.00	2.00
Athens	10.00	5.00	5.00	2.00	1.00	40.00	1.00
Skopje	3.00	1.00	1.00	1.00	1.00	20.00	1.00
Prague	5.00	1.00	2.00	1.00	1.00	30.00	1.00
Ljubljana	5.00	3.00	2.00	2.00	1.00	40.00	1.00
Istanbul	2.00	2.00	1.00	1.00	1.00	20.00	1.00
Zagreb	10.00	3.00	2.00	2.00	1.00	40.00	1.00
Warsaw	5.00	2.00	2.00	1.00	1.00	30.00	1.00
Bucharest	5.00	2.00	2.00	1.00	1.00	30.00	1.00
Budapest	5.00	2.00	2.00	1.00	1.00	30.00	1.00
Belgrade	5.00	2.00	2.00	1.00	1.00	25.00	1.00
Sofia	5.00	2.00	2.00	1.00	1.00	30.00	1.00



GLOSSARY

Accommodation establishments - hotels, motels, apartment tourist complexes, tourist villages, holiday villages, villas, family-run hotels, hostels, boarding houses, holiday houses, guest rooms, guest suites, guest houses, bungalows and campsites.

Average accommodation occupancy rate - a derived indicator reflecting the degree of utilization of the available accommodation capacity of the accommodation establishment. It is calculated as the ratio between the number of overnight stays and the number of beds ready for exploitation in the accommodation facility. (a work definition, created for the purpose of this publication).

Backpacker – a tourist practicing backpacking tourism

Backpacking - a low-cost form of tourism, regardless of the type of travel and transport. The term "backpack" comes from English, and literally means "rucksack". It refers to tourists, carrying on their backs big tourist backpacks or other luggage that is easily carried at long distances for a long period of time. It involves the use of public transport, low-cost accommodations (usually hostels or youth hostels) and a longer duration of stay compared to traditional holiday travel related mostly to sightseeing. It is practiced mainly by young people who have more free time.

Bar – an establishment that offers a wide variety of alcoholic and non-alcoholic drinks, cocktails, hot drinks, nuts, pastry and sweets, and a limited variety of culinary products.

Boarding house – an accommodation establishment where people usually stay for a longer period of time. It is furnished with the most necessary furniture, equipment, and utensils for use and self-service.

Bungalow – an accommodation establishment operating seasonally or all-year-round, equipped with a bathroom but not always with a kitchenette.

Campsite – a guarded area with appropriate infrastructure and the necessary conditions for the stay of tourists in their own or rented tent or trailer. It also offers parking space and tourist services. On the territory of the campsite there may also be bungalows, trailers (mobile accommodation establishments with or without a kitchenette and a bathroom), and other establishments.

Catering and entertainment establishments: restaurants, quick service restaurants, pubs, coffee shops, bars, etc.

Coffee shop – an establishment that offers confectionery, pastries, ice cream, alcoholic and non-alcoholic drinks.

Drinking establishment - offers a wide variety of alcoholic drinks, non-alcoholic beverages and snacks

Family hotel - a building in an appropriate architectural style, consisting of 5-20 accommodation rooms, carrying out hotel business. The establishment is run by hosts or hired staff that provide personal service to guests. It has at least one catering and entertainment establishment.

Guest house - a low-rise building that has no more than 10 rooms for accommodation. Guests have access to common rooms such as living room, furnished kitchen, dining room or dining area, and a recreation area in the yard. The establishment is run by the hosts that live in the same building or next to it and they also cater to guests. The hosts take care of the needs of the guests and prepare some of the meals.

Guest suite - an apartment in a residential building that is let to tourists

Guest rooms– up to 5 rooms - separate or in flats in a single building, let to tourists for overnight stays.

Holiday village – a territorially separate group of low-rise massive villas where basic and various additional tourist services are offered. It is comprised of at least 5 villas and there is at least one catering and entertainment establishment.

Hostel -a low-budget accommodation establishment where rooms are mixed or single-sex, and there can also be private rooms. Bathroom, living room, and furnished kitchen with a dining room are shared.

Hotel - a publicly accessible building or buildings that are functionally linked, with at least 15 accommodation rooms, offering basic and additional tourist services related to the tourists' stay. For hotels built before June 1, 2003 and ones located in populated places or in parts of them with historical, archaeological, ethnographic or architectural importance, the number of rooms must be smaller by 20%. The hotel must have at least one catering and entertainment establishment.

International visitor – a person that visits a country outside his/her usual environment for no more than 12 consecutive months for business, pleasure or personal reasons that don't include the pursuit of an activity for which they receive remuneration. (International Recommendations for Tourism Statistics 2008 (IRTS 2008))

Motel - a type of roadside hotel offering accommodation and services to tourists. It is located outside a populated place, or in close proximity to a busy transport junction or highway. The motel has at least one catering and entertainment establishment.

Passengers - all persons moving between two or more geographical points with different purpose and duration. (International recommendations for tourism statistics (IRTS 2008))

Quick service restaurants – a restaurant where a limited assortment of culinary products and / or ready packaged food, desserts, alcoholic and non-alcoholic drinks are served. It is a self-service establishment.

Recreational resort – a separate accommodation establishment with prevalent social functions and with infrastructure, offering health, spa, sports, and other services.

Restaurant - an establishment, offering meals and pastry, as well as alcoholic and non-alcoholic beverages. Customer service is performed by duly qualified staff.

Tourism - a social, cultural and economic phenomenon, related to the movement of people towards places outside their traditional place of residence for personal or professional purposes. (International recommendations for tourism statistics (IRTS 2008)).

Tourist - a visitor whose stay lasts at least 24 hours, thus spending at least one night in the visited destination for the purpose of tourism, recreation, sport, wellness procedures, business, visits to relatives and friends, pilgrimage, participation in a congress, a conference or a cultural event.

Tourist chalet – a massive building designed for short-term recreation where basic and additional tourist services are offered. Furnished and equipped with the most necessary furniture, equipment, and utensils for self service. It offers tourist, ecological and other types of information.

Tourist Destination - a regulated set of economic, social, cultural and environmental activities carried out in tourist sites with real borders, with the purpose of production, realization and consumption of goods and services, generating the attractiveness of the tourism product (package) with sustainable competitiveness and efficiency.

Tourist village - a separate, territorially distinct group of accommodation establishments with a common engineering and tourism infrastructure, that offers basic and additional tourist services. It is comprised of at least five accommodation establishments and has at least one catering and entertainment establishment.

Villa - a massive low-rise building, incorporating at least: hallway, living room, two bedrooms, kitchenette, dining room, bathroom, terrace and parking space