



STAY

Still Tourism Around Yard

NATIONAL REPORT OF AGROTOURISM IN SLOVENIA

April 2023





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This publication was produced as part of the Erasmus+ project "Still Tourism Around Yard" (STAY), within the KA220-VET 2022 call. The contents reflect the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein. Project Number: 2022-1-SI01-KA220-VET-000087663

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CONTENTS

1. Origins of rural tourism in Slovenia	3
1.1. Definition of rural tourism	3
1.2. The role of farm tourism in the Slovenian economy and rural areas	4
1.3. Farm tourism opportunities and key documents and guidelines for rural development	6
1.4. Common Agricultural Policy 2023-2027 and financing	8
2. Legislation and Regulation	10
2.1. Legal conditions for carrying out farm tourism in Slovenia	10
2.2. Interview with the Mayor of 142.3.Organisations related to farm tourism in Slovenia	15
3. Relevant data regarding 163.1. Guest structure	19
3.2. Economic indicators	19
3.3. Guest demand and needs	20
3.4. Digitalisation of the sector	21
3.5. Non-formal and formal training opportunities in the field of agriculture	24
4. Swot analysis	26
References	27

Table of figures

Figure 1: Environmental factors in rural tourism (Bauman, 2017)	3
Figure 2: The goals of CAP 2023-2027 (Source: CAP 2023-2027)	9
Figure 3: Arrivals and overnight stays of tourists on farms with tourist accommodation (domestic and foreign) in 2019 and early 2020 (SOURCE: KGZS)	19

Table of tables

Table 1: Number of farms with registered types of complementary activity by year 2016-2022 (Source: Ministry of Agriculture and Rural Development, 2023)	14
Table 2: Complementary activities on family farms in 2010, 2013 and 2016 (Source: STAT)	17

1. Origins of rural tourism in Slovenia

1.1. Definition of rural tourism

Rural tourism is a type of tourism defined in Slovenia under the terms rural tourism, agrotourism, farm tourism, rural tourism, and village tourism and is one of the fastest growing and most successful economic sectors of the 21st century (Golob, 2021). Rural tourism is typically used when the countryside is a key component of the offer. This form of tourism offers visitors a personal approach, a taste of the natural and social rural environment, allowing them to get to know and participate in the traditional customs and daily activities of the local population without destroying or interfering with the host ecosystem (Bauman, 2017).

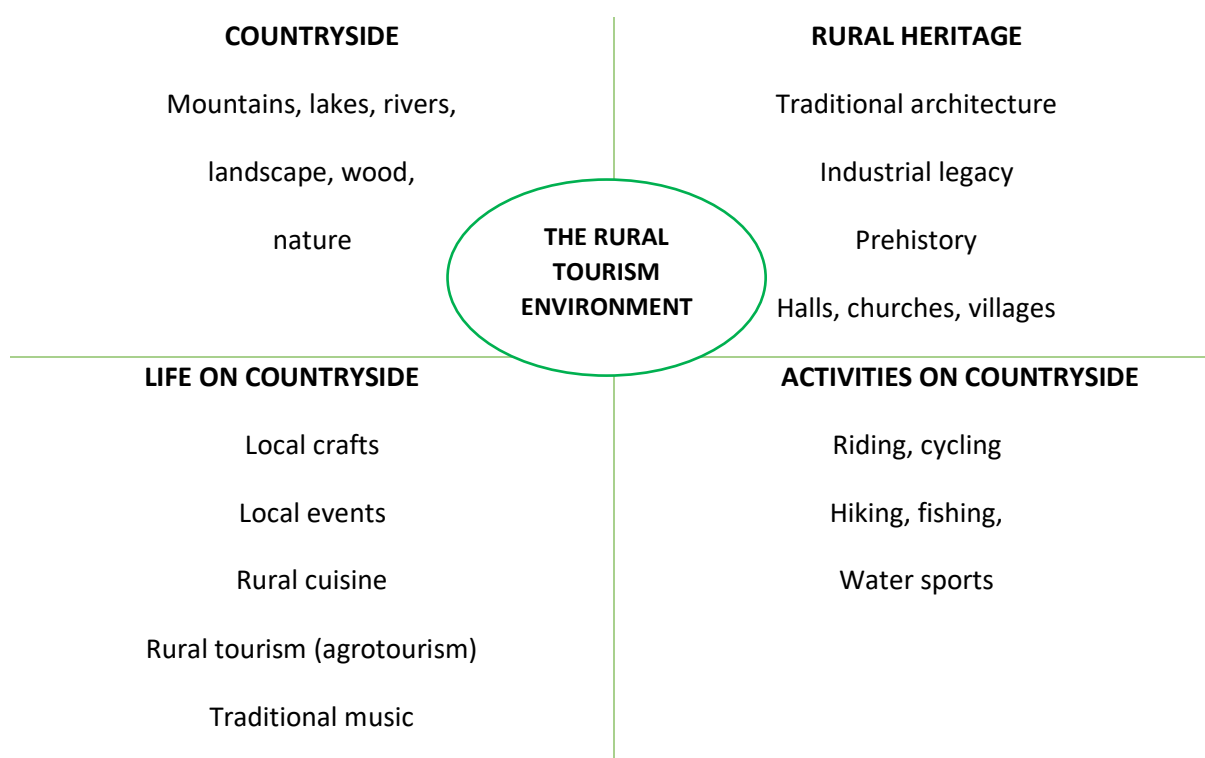


Figure 1: Environmental factors in rural tourism (Bauman, 2017)

Rural tourism can be associated with different forms of tourism: adventure, educational, eco-tourism, sports (climbing, horse riding, hiking, etc.), health, art, historical tourism. To be defined as rural, tourism must take place in an area that has typical rural characteristics: small settlements, low population density, agriculture as the predominant industry and traditional social customs. From a geographical and demographic point of view, it can be defined as a multi-faceted activity taking place outside highly urbanised areas, with a small amount of

economic activity in tourism and in areas of agricultural arable and forest land. Alternatively, it can be defined as an activity that depends on the countryside and takes advantage of its assets (Bauman, 2017).

In Slovenia, the countryside is characterised by dispersed settlements and thus a large number of small settlements, due to unfavourable but varied natural conditions. Due to these characteristics, it has a high degree of natural biodiversity and cultural diversity (Bauman, 2017). The Slovenian countryside is extremely diverse, and uniquely shaped with many landscape features that have a decisive influence on the habitability, scale, type of land use and the chosen farming method. The quality of life in rural areas is linked to the preservation of cultural landscapes and natural heritage (Ministrstvo za kmetijstvo, gozdarstvo in prehrano, 2022).

Rural tourism has the potential to integrate sustainable tourism characteristics if properly managed. As rural areas differ in their geographical, natural and cultural characteristics from one area to another, each destination has different opportunities for developing its tourism offer, activities and competitive advantages. All this has led to the development of many forms and types of rural tourism (Bauman, 2017).

Agrotourism or farm tourism is the most common form of rural tourism. It is tourism that takes place on an operating farm, where tourists can observe and/or participate in traditional farm tasks without interfering with the ecosystem (Bauman, 2017). Tourists typically visit a tourist farm to relax, learn and actively engage in farm life. Which, for an operational farm with additional complementary economic activity, brings additional income, actual physical help and disperses risk or reduces dependence on only one activity on the farm (Bauman, 2017).

1.2. The role of farm tourism in the Slovenian economy and rural areas

Tourist farms are an important part of the Slovenian tourist offer and are of great interest to tourists because of the rich and attractive natural and cultural heritage of the countryside, the tranquillity that the countryside offers, the authenticity of home-made, local and regional dishes and drinks, produced on the land and prepared in harmony with the seasons. The farm also has the advantage of being non-massive and of an individual approach to its guests. Escape from the city and the hustle and bustle of everyday life, authentic contact with nature and unforgettable experiences are what more and more people want today (Kosi, 2020).

The last four years before the Covid-19 crisis also saw an increase in the number of tourists visiting tourist farms due to the increase in the number of tourists, especially foreign tourists. On average, the number of tourists has increased by 15% per year, and in some cases by 50% or more. Farm tourism is considered to be one of the most demanding and common forms of tourism in rural areas, with more than 1 000 farms. Due to the high demand for this type of offer from both domestic and foreign tourists, the number of such farms has more than doubled in the last 20 years (Kosi, 2020).

Farm tourism is all about complementary activities that can employ family members, make use of their skills and make better use of agricultural produce. The additional income not only helps to strengthen the economic situation of farms, but often also ensures their survival, and with them the preservation of agricultural production and the cultural landscape (Hadela R., 2010/2011).

The Sustainable Growth Strategy for Slovenian Tourism 2017-2021 sets out the strategic vision of Slovenian tourism as Slovenia is a global green boutique destination for discerning guests looking for diverse and active experiences, peace and personal benefits. And all this can be found on tourist farms (Kosi, 2020).

The number of agricultural holdings in Slovenia has been declining since 2000. In 2000 there were 86 467 agricultural holdings, in 2010 there were 74 646 and in 2020 there will be 68 331. On average, a holding cultivated 5.6 hectares of agricultural land in 2000, 6.4 hectares in 2010 and 6.9 hectares in 2020. In addition, the average holding kept 5.4 heads of large livestock (LU) in 2000, 5.5 LU in 2010 and 6.0 LU in 2020 (Krajnc in Šuštar, 2022).

The past strategic period in the development of Slovenian tourism (2017-2021) can be characterised as a period of intensive growth until the start of the covid-19 epidemic. Tourism has become an important economic sector, contributing 9.9% to Slovenia's GDP, 3.9% to value added and employing 6.5% of the total workforce in 2019, with all related activities (direct, indirect and induced effects). Direct and indirect tourism activities together contributed 6.5% to Slovenia's GDP, 3.1% to Slovenia's total value added and employed 5% of Slovenia's working population in 2019 (Slovenian Tourism Strategy 2022-2028, 2022).

1.3. Farm tourism opportunities and key documents and guidelines for rural development

Opportunities for increasing the visibility of farm tourism are also presented by the various certificates and participation in various foreign schemes related to tourism activities, such as:

- **SLOVENIA GREEN ACCOMMODATION (ZSST):** The Slovenian Green Tourism Scheme already includes more than 50 accommodation providers that have been awarded the Slovenia Green Accommodation label for their sustainable and green efforts, including tourist farms, small boutique hotels, campsites and glamping sites, as well as green accommodations with special stories to tell. The SG Accommodation label can be awarded on the basis of one of the internationally recognised certifications.
- **GASTRONOMY (SLOVENIA GREEN CUISINE):** The SG Cuisine label is conditional upon obtaining one of the international sustainability certificates (Green Key or L.E.A.F) and signing the Slovenian Sustainable Gastronomy Commitment. By obtaining the label, the providers commit themselves to seven sustainable principles: authenticity of the offer, linking with local suppliers, focusing on nature, operating with minimum waste, using clean water, responsibility towards the environment and responsibility towards their employees.
- **SLOVENIA UNIQUE EXPERIENCES:** The Unique 5-Star Experience label is awarded by the Slovenian Tourist Board. Each label holder guarantees that its offer is local, authentic, unique, experiential, boutique, sustainable and of premium quality. Guests can rely on experiencing the story in a very personal way, in an original setting, in contact with the locals, in a way that has not been transferred from elsewhere and which is in line with sustainable tourism principles.
- **GREEN & SAFE:** The GREEN & SAFE label identifies and highlights high hygiene standards and protocols and sustainable recommendations for Slovenian tourism providers and destinations. Through activities based on safety, responsibility and sustainability, we increase guest confidence that Slovenia is a green and safe tourist destination (Združenje turističnih kmetij Slovenije, 2023).
- **QUALITY APPLES**

The quality of services at tourist accommodation farms is marked with apples. The quality of the offer of the tourist farms is checked every 3 years by the competent institution.

- ✓ **1 APPLE:** simply furnished rooms with shared bathroom and toilet
- ✓ **2 APPLES:** good farm offer, simply furnished rooms (at least half of them with private bathroom and toilet)

- ✓ **3 APPLES:** very good offer of the farm, well equipped rooms (most with private bathroom and toilet)
- ✓ **4 APPLES:** apart from the very good facilities, it offers an interesting and active holiday even when children come to the farm unaccompanied by their parents, most often with their educators. Some farms provide the care and a varied programme of activities entirely on their own. Farm stay programmes include learning about nature and farm work, and animated play under the careful guidance of educators or other professionally trained persons (Združenje turističnih kmetij Slovenije, 2023).

Many guidelines have been presented in the field of rural development programmes and strategies in Slovenia, and the country has a long experience in their implementation. The rural development programmes presented in Slovenia have established a good basis for further development and for the formulation and implementation of strategies, as a large number of development institutions have started to operate in rural areas and a wealth of knowledge and experience has been acquired.

- ✓ **The Rural Development Programme 2014-2020:** Presented by the Ministry of Agriculture, Forestry and Food in a comprehensive publication, which presents an analysis of the situation of the Slovenian countryside in terms of its strengths and weaknesses and the strategy chosen to tackle them. It presents the rationale for the priorities chosen, taking into account the Community guidelines and the National Strategic Plan and the expected impact of the ex-ante evaluation. The programme also includes a financial plan for the implementation of the European Agricultural Fund for Rural Development. Slovenia has obtained €838 million from the EU budget through this project (Bauman, 2017).
- ✓ **Integrated Rural Development and Village Renewal (CRPOV):** The programme was intended to improve the quality of life in all aspects and the implemented RURAL DEVELOPMENT PROGRAMME projects mainly concerned the promotion of the development of complementary income sources, tourism activities, infrastructure, heritage preservation, and various activities to promote social and community facilities. The main objective was to create a development motive and vision for the area under consideration, which reflected the consensus of the vast majority of the local population. They represented a new approach to rural development with the active involvement of the local population (Bauman, 2017).
- ✓ **The LEADER programme:** In Slovenia, it was launched in the period 2007-2013 with the aim of improving rural development opportunities by exploiting local resources and the

active role of the local population in the development of their area and the implementation of planned actions. Its main objective was the integrated development of the population by building local capacities, improving employment, improving governance in rural areas, spreading innovation and promoting partnership cooperation (Bauman, 2017). In the 2014-2020 programming period, in terms of the number of LASs (local partners in linking rural stakeholders), it has increased from 33 to 37, with the whole of Slovenia and 100% of the rural population covered by approved LASs. It can enable the implementation of integrated, complex, innovative projects through different funding sources (existing implemented projects with a broad content and networking of stakeholders in the following areas: tourism, village renewal and development, cultural heritage, agriculture, society, social, education, environmental protection, digital solutions,...) (CAP, 2023-2027). Available funding: € 44.428.195 (Žagar, 2022).

1.4. Common Agricultural Policy 2023-2027 and financing

The CAP Strategic Plan 2023-2027 for Slovenia sets out a set of actions (interventions) to implement the 9 specific objectives of the European CAP and the horizontal objective on knowledge dissemination, innovation and digitisation. In doing so, the CAP 2023-2027 follows all 3 overarching objectives of the CAP: competitiveness and resilience of the agricultural sector, protection of the environment and climate, and coherent rural development (CAP 2023-2027).

The beneficiary of the support is the holder of a non-agricultural complementary activity on a farm. The intervention will contribute to creating better conditions for maintaining or creating new jobs in rural areas and, in particular, to diversifying the incomes of agricultural holdings. The intervention will support various non-agricultural complementary activities on the farm, such as tourism activities, wood processing and value-adding activities, manufacturing and service activities, production of electricity and heat from renewable energy sources, etc. The rate of public support in the form of grants is 30 % of the eligible costs (construction costs, renovation of immovable property, purchase of equipment and installations, etc.) of the investment (Strateški načrt skupne kmetijske politike 2023-2027 za Slovenijo, 2023).

In the context of food and energy security, climate and environmental challenges, the overarching objective of the Slovenian SN 2023-2027 is to ensure sustainable food production throughout the country and to increase self-sufficiency, with all areas and all agricultural holdings being relevant, irrespective of their size, orientation or market orientation. This umbrella policy provides answers to the challenges of food security as well as the environmental and climate challenges ahead (CAP 2023-2027).

Within the CAP Strategic Plan 2023-2027 for Slovenia, € 1,798,311,677 is available. Of which:

- € 683.500.469 for the first pillar of the CAP (direct payments, wine and beekeeping):
- € 1.114.811.208 for the second pillar of the CAP or rural development (€ 550.850.960 from the EU budget and € 563,960,248 from the budget of the Republic of Slovenia).

Raising the quality of life and strengthening economic activity in rural areas is also an important objective of the CAP Strategic Plan 2023-2027. In addition to agricultural activities, complementary activities will be developed, including the bio-economy and cultural heritage conservation activities, which make an important contribution to raising and stabilising farm incomes. Complementary activities also help farms to make better use of their productive capacity and contribute to the diversity of the agricultural product supply (CAP, 2023-2027).

In addition to own funding, various EU, national and municipal funds are also available. The most suitable tenders are those of the Ministry of the Economy, Tourism and Sport - MGTŠ (formerly the Ministry of Economic Development and Technology) and the Ministry of Agriculture, Forestry and Food - Ministry of Agriculture, Forestry and Food, which, under the Common Agricultural Policy, determines the measures on which complementary activities can be financed. The Agricultural Markets Agency, which is responsible for tendering and monitoring, operates within the Ministry. Rural development funding is obtained through bottom-up projects managed by Local Action Groups and their representatives. The Slovenian Public Agency for Marketing and Promotion of Tourism (STO) also calls for tenders for funds to promote tourism.

Promoting a smart, competitive, resilient and diversified agricultural sector that ensures long-term food security	Promoting and strengthening environmental protection, including biodiversity and climate action, and contributing to the achievement of the Union's environmental and climate objectives, including its commitments under the Paris Agreement.	Strengthening the socio-economic fabric of rural areas.
(1) Supporting sustainable farm incomes and the resilience of the agricultural sector across the Union to enhance long-term food security and agricultural diversification and ensure the economic sustainability of agricultural production in the Union.	(4) Contributing to climate change mitigation and adaptation, including reducing greenhouse gas emissions and increasing carbon sequestration, and promoting sustainable energy.	(7) Attracting and retaining young farmers and other new entrants to the profession and promoting sustainable rural enterprise development.
(2) Strengthening market orientation and increasing both the short- and long-term competitiveness of	(5) Contributing to halting and reversing biodiversity loss, enhancing ecosystem services and conserving habitats and landscapes.	(8) Promoting employment, growth, and gender equality, including women's participation in farming, social inclusion and local development

farms, including through a greater focus on research, technology and digitalisation.		in rural areas, including the circular bio-economy and sustainable forestry.
(3) Improving the position of farmers in the value chain.	(6) Contributing to halting and reversing biodiversity loss, enhancing ecosystem services and conserving landscape habitats.	(9) Improving the response of Union agriculture to society's food and health demands, including high quality, safe and nutritious food produced sustainably, reducing food waste, improving animal welfare and tackling antimicrobial activity.
Horizontal goal Modernising agriculture and rural areas by promoting and disseminating knowledge, innovation and digitalisation.		

Figure 2: The goals of CAP 2023-2027 (Source: CAP 2023-2027)

2. Regulation and legislation

In Slovenia, tourism is underpinned by the Act on the Promotion of Tourism Development, which regulates the planning and implementation of the promotion of tourism development at the national level and at the level of the tourist area, the tourist and promotion tax, the conditions for the activities of organising and selling tourist packages and related travel arrangements, and tourist guiding. In the field of rural tourism, the aforementioned Act is to be followed in the case of “accommodation establishments”, which also include tourist farms with accommodation (Zakon o spodbujanju razvoja turizma, 2018).

Complementary activities on the farm make better use of the produce, the labour and skills of family members, the space on the farm, natural features, equipment and machinery. Farmers most often choose complementary activities to increase their farm income, to adapt to new market conditions, to be entrepreneurial and innovative, to lose their jobs and traditions (Kumer, 2011).

2.1. Legal conditions for carrying out farm tourism in Slovenia

The conditions for carrying out tourism activities on a farm are defined in the Agriculture Act and the Hospitality Act, as well as in the by-laws, which lay down the minimum technical conditions and the minimum scope of services for carrying out tourism activities on a farm, and the conditions for categorising tourist farms with accommodation (Kumer, 2011).

Agrotourism is not defined by a number in the law. It is defined through the Regulation on complementary activities on the farm (Uradni list RS, št. 57/15), which sets out the groups and types of complementary activities on the farm, their characteristics and scope, the content of

the application for a licence to carry out a complementary activity, entry in the register of agricultural holdings, more detailed conditions for carrying out complementary activities, supervision and sanctions for infringements.

CONDITIONS FOR CARRYING OUT COMPLEMENTARY ACTIVITIES

Two basic conditions must be fulfilled when carrying out complementary activities on the farm:

- the farm must have at least one hectare of comparable agricultural area or at least 10 bee colonies in use,
- the annual income from complementary activities on the farm must not exceed three average annual salaries per employee in the Republic of Slovenia in the previous year, or five average annual salaries in the less-favoured areas for agricultural activity

For the calculation of the comparable agricultural area, the declared graphic agricultural land use units (GERUs) in the agricultural holding register are taken into account. With regard to the different uses of the GERUs, the maximum eligible area of the GERU is considered as 1 hectare of comparable agricultural area. For the conversion of 1 hectare of comparable agricultural area, the following is considered:

- 1 ha of arable land,
- 2 ha of grassland,
- 0,25 ha of permanent crops (orchards, vineyards, olive groves, nut orchards, hop plantations, asparagus, artichoke and fast-growing artichoke plantations, nurseries),
- 0,1 ha of greenhouses or
- 8 ha of forest tree plantations.

The following groups of complementary activities may be carried out on the farm:

- processing of primary agricultural products,
- processing of forestry timber products,
- sale of agricultural products and farm produce,
- rearing and processing of aquatic organisms,
- farm tourism,
- activities related to traditional skills, services or products,
- the processing of vegetable waste and the production and sale of energy from renewable sources,
- services with agricultural and forestry machinery and equipment and manual work,

- consultancy and training services relating to agricultural, forestry and complementary activities,
- social welfare services.

Sales of products in the previous year do not have to be reported to the administrative unit. If you sell:

- your own products (complementary activity processing primary agricultural products),
- your own agricultural produce and products and agricultural produce and products from other farms (complementary activity of selling agricultural produce and products from farms), you must keep, for 10 years from the date of the transaction, the invoices received and records of your own quantities of raw materials processed, or other supporting documents containing information on the quantities and origin of the raw materials.

LET'S SEPARATE:

FARM TOURISM, WHICH IS A CATERING ACTIVITY COMPRISING:

Tourist farm with accommodation, excursion farm, wine bar and “osmica”.

For products processed on the farm and offered and sold only to guests, processing of primary agricultural products and rearing and processing of aquatic organisms - no licence is required for these complementary activities (Ministrstvo za kmetijstvo, gozdarstvo in prehrano, 2022).

Required share of own raw materials: The farm must provide at least 50% of its own raw materials (40% in mountain areas). Up to 25% of the value of the supply (35% in mountain areas) may be provided by the farm by purchasing raw materials produced on other farms on the local market or processed on other farms with complementary activities. Up to 25% of the value of the offer may be purchased by the farm from raw materials and products sold freely (trade). The origin of the raw materials must be indicated prominently in the offer. The operator of the complementary activity must prove the quantities, value and origin of the raw materials (Ministrstvo za kmetijstvo, gozdarstvo in prehrano, 2022).

Location of the complementary activity: Overnight accommodation may be provided in rooms, apartments, dormitories, camping pitches, caravan sites, as well as in a hayloft or beehive. The complementary activities of the farm excursion farm are carried out within 3 kilometres as the crow flies of the farm address, the wine cellar and the eight-bar are carried

out at the farm address or in the adjacent vineyard building (Ministrstvo za kmetijstvo, gozdarstvo in prehrano, 2022).

Capacity: A maximum of 30 beds in rooms, apartments and dormitories. A maximum of 30 persons may be accommodated in camping pitches or other forms of accommodation. In the case of a farm stay, a maximum of 60 seats in front of the accommodation, 60 seats inside the accommodation and a maximum of 60 guests at any one time. If the farm is also licensed for tourism on a farm with accommodation, the seating limit does not apply to accommodation guests. Wine cellars may have a maximum of 60 seats in front of the premises, 60 seats in the premises and a maximum of 60 guests at any one time (Ministrstvo za kmetijstvo, gozdarstvo in prehrano, 2022).

The ancillary activities of transporting passengers by means of horse-drawn carts and tractors, riding animals and apiculture may be carried out within 3 kilometres as the crow flies of the farm address, and other activities may be carried out on the local market (Ministrstvo za kmetijstvo, gozdarstvo in prehrano, 2022).

- Rules on the minimum technical conditions and scope of services for the provision of catering services

These Regulations lay down the minimum technical conditions relating to the premises, equipment and facilities of each type of catering establishment, of the establishment of a caterer and of a farm on which a catering activity is carried out (hereinafter referred to as 'tourist farm'), the conditions relating to the external areas of catering establishments and the conditions for the exercise of catering activities outside catering establishments (hereinafter referred to as 'minimum technical conditions for the exercise of catering activities'), and the conditions relating to the range of services to be provided by each type of catering establishment, of the establishment of a caterer or of a farm on which a catering activity is carried out (PISRS, 2017).

- Rules on the minimum conditions to be met by forestry contractors

This Regulation lays down the minimum conditions to be met by persons registered to carry out forestry operations (PISRS, 2017).

Table 1: Number of farms with registered types of complementary activity by year 2016-2022 (Source: Ministry of Agriculture and Rural Development, 2023)

	2016	2017	2018	2019	2020	2021	2022	Average annual growth
All complementary activities	15.478	17.303	18.170	19.094	20.195	21.075	21.747	7%
PROCESSING OF PRIMARY AGRICULTURAL PRODUCTS	3.117	3.616	3.881	4.183	4.464	4.683	4.833	9%
PROCESSING OF FOREST WOOD PRODUCTS	1.127	1.280	1.348	1.413	1.466	1.534	1.601	7%
SALE OF AGRICULTURAL PRODUCE AND FARM PRODUCTS	888	986	1.037	1.104	1.125	1.115	1.165	5%
FARM TOURISM, WHICH IS A CATERING ACTIVITY	920	1.018	1.067	1.112	1.219	1.309	1.333	7%
FARM TOURISM OTHER THAN CATERING	475	552	565	604	670	706	727	9%

2.2. Interview with the Mayor of municipality Jezersko

The Mayor of Jezersko, Andrej Karničar, spoke about the role of the municipality in tourism in the agricultural sector, saying that the municipality's role is essential, especially in the provision of basic public infrastructure (roads, sewerage, car parks, water, sewage treatment plants, electricity, etc.). They also work with the nursery and school system - with the local community. The municipality gives very modest financial support, incentives, and subsidies to support agricultural programmes - tenders (€15.000). This is money that can be used to carry out basic and complementary activities. The municipality itself has decided how much to allocate to tourism development. The municipality has a great influence on the climate in a given place.

Tourism is very important for the municipality as it provides many employment opportunities. The municipality is very supportive of tourist farms. Cooperation is very important. In 2022, tourists from 80 different countries visited the municipality. Most of them came from Germany, the Netherlands, Belgium and the Czech Republic. Generally, people make their choices according to the type of holiday they want.

The better quality of tourism development is represented by the ownership of land - the conflict between public and private. How to get people excited about the potential they have for developing tourism in rural areas is also crucial. The municipality involved has a major

problem with the protection of cultural landscapes, which presents more difficult requirements, especially in bureaucracy. Farmers are also supported by - support/private agencies that take over the whole process of integration into a tourist farm.

The issues within the legislation are indeed written down, but the implementation and supervision of this is very poor. The problem with the legislation is that it also restricts the conditions for opening a tourist farm (SOURCE: Interview with the Mayor of Jezersko, 9.3.2023).

2.3. Organisations related to farm tourism in Slovenia

The Association of Tourist Farms of Slovenia was founded at the end of 1997. The Association is organised in accordance with the provisions of the Law on Associations and has the status of an activity in the public interest. Since the association's foundation, the Agricultural Forestry Institute Celje has provided indispensable technical assistance, while the Agricultural Forestry Agency, together with the Ministry of Agriculture and Rural Development, has provided financial support. As a regional tourist organisation, it brings together 404 tourist farms from all over Slovenia. Its members have around 2.600 beds and 13.800 seats (Združenje turističnih kmetij Slovenije, 2023).

Since its foundation, the association has been responsible for the joint appearance of tourist farms on the market, for the development of the offer, for providing information to farm tourism operators, and for representing members' interests in the economic and legal spheres. It also offers its members free advice on current affairs, monthly information on current events, free presentations at the association's fairs, cheaper publications in the association's promotional material, cheaper publications on the internet and reduced or free training (computer courses, foreign language courses, communication with guests, etc.) (Združenje turističnih kmetij Slovenije, 2023).

Promotional activities over the past 20 years have had a significant impact on increasing the visibility of the offer of tourist farms, improving consumer awareness, and better recognition of and a greater liking for the offer of Slovenian tourist farms (Združenje turističnih kmetij Slovenije).

Since its inception, the Slovenian Tourist Farm Association has worked closely with:

- Slovenian Tourist Board,
- the Slovenian Ministry of Agriculture, Forestry and Food,

- the Ministry of Economic Development and Technology of the Republic of Slovenia,
- the Slovenian Chamber of Agriculture and Forestry,
- the Agricultural Forestry Institutes within the Slovenian Chamber of Agriculture and Forestry, and various educational institutions (Združenje turističnih kmetij Slovenije).

3. Relevant data regarding agrotourism

Farm tourism is divided into hospitality and non-hospitality tourism. Complementary activities to farm tourism, which is a catering activity, include: tourist farm with accommodation, excursion farm, wine bar and eight-bar farm. Non-catering complementary farm tourism activities include: transporting passengers by horse-drawn carts and tractors, riding animals, renting out picnic areas, museums and theme collections, theme parks, apitourism, sport fishing on the farm's water areas (Sekolovnik, 2019).

The MKPG records the number of farms with the complementary activity of farm tourism according to the RKG data from April 2023:

- **503 excursion farms:** They offer hot and cold meals and drinks. This type of accommodation operates on Fridays, Saturdays and Sundays. Weekdays by arrangement.

- **112 wine bars:** Offering cold snacks, wine and soft drinks. This type of accommodation is open on Fridays, Saturdays and Sundays. Weekdays by arrangement.

- **41 "osmicas":** Offering wine and soft drinks, three locally typical hot dishes, cold snacks, bread and pastries. They can be open up to twice a year for up to 10 days, most often in summer

and spring. Osmice (Osmicas) date back to the time of Maria Theresa and are widespread especially in Primorska. They are marked with ivy sprigs along the roads and ivy bunches in the courtyards.

- **699 tourist farms with accommodation:** They offer farm stays with food or apartments for rent only. There is also a choice of meals: bed and breakfast, half-board, full-board, renting an apartment on the farm.

- **A glamping site** is a place on a farm where a camping area is provided with all the necessary facilities required for a well-equipped camping site. (Združenje turističnih kmetij Slovenije).

The tourist farms of the Association of Tourist Farms of Slovenija have a total of about 36.000 seats and 5.851 guest beds.

Table 2: Complementary activities on family farms in 2010, 2013 and 2016 (Source: STAT)

Complementary activities on family farms by: COMPLEMENTARY ACTIVITIES, YEAR			
	2010	2013	2016
Complementary activities - TOTAL	12.51 7	11.67 6	12.48 6
Meas processing	155	337	257
Milk processing	242	241	264
Fruit and vegetable processing	502	342	403
Other food processing activities	1.637	1.135	623
Wood processing	513	520	415
Provision of services by agricultural machinery for others	310	262	243
Farm tourism	642	726	665
Home crafts	167	181	153
Aquaculture	28	61	20
Forestry services	173	239	153
Forestry	9.078	8.705	9.809
Utilities	328	391	626
Producing and marketing energy from renewable energy sources	78	96	167
Other	407	81	303

According to the Association of Tourist Farms of Slovenia, more than 900 farms are involved in tourism as a complementary activity to farming. According to the Statistical Office of the Republic of Slovenia, 109,532 guests visited tourist farms in 2019. Interestingly, 80% of the overnight stays in tourist farms came from abroad. The proportion of domestic and foreign guests visiting the farms as day guests on excursion farms, wine taverns and eight-star farms is the opposite (KGZS, 2020).

By specialising, farms can provide additional facilities and amenities for specific target groups:

- Family-friendly tourist farm

A family-friendly farm in an authentic farm environment, providing entertainment for children. They create a child-friendly living environment and space (room furnishings, playground equipment, healthy food). They also involve parents in these activities as well.

- Tourist farm with healthy living facilities

They provide holidays for people with a healthy lifestyle. They also offer active leisure activities in unspoilt nature, which they combine perfectly with healthy eating.

-A tourist farm for horse lovers and horse riding enthusiasts

Offering a wide range of riding opportunities on the farm and in the surrounding area, they provide information on riding lessons, guided field trips, horse hire, riding lessons, guiding tourists on riding trails and terrains. Guests can maintain and care for the horses.

- Children-friendly tourist farm for unaccompanied children

The farm offers an interesting and active way to spend your holidays, even when children come to the farm unaccompanied by their parents, most often with their educators. Some farms provide care and a varied programme of activities entirely on their own. Farm stay programmes include learning about nature and farm work, and animated play under the careful guidance of educators or other professionally trained persons.

- Bicycle-friendly tourist farm

Offers a wide range of cycling opportunities in the surrounding area, information on cycling routes and their features, and information on attractions accessible by bicycle. You can store your bicycles at the farm or, if you don't bring them with you, you can borrow them.

- Vineyard tourist Farm

The wine tourism farms, which are mostly located along the wine tourism roads, are friendly homestays that treat their guests to excellent wines and tasty culinary delights. Guests can learn about vineyard and cellar work. These farms are not only attractive to wine connoisseurs, but their hospitality and homeliness charm everyone.

- Disabled-friendly farm

The farm allows guests to move around the farm independently in their wheelchairs and in the rooms reserved for them, which are equipped to the greatest extent possible to meet their needs.

(Združenje turističnih kmetij Slovenije, 2023).

*Figure SEQ Slika * ARABIC 3: Arrivals and overnight stays of tourists on farms with tourist accommodation (domestic and foreign) in 2019 and early 2020 (SOURCE: KGZS)*

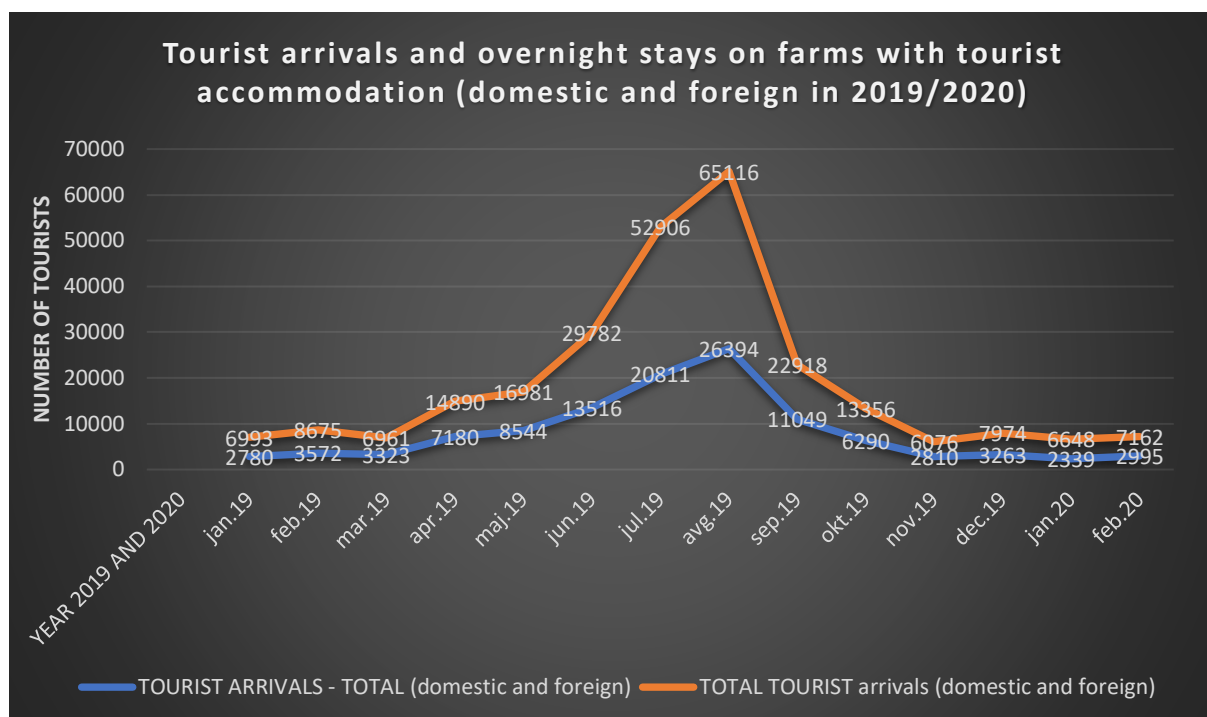


Figure 3: Arrivals and overnight stays of tourists on farms with tourist accommodation (domestic and foreign) in 2019 and early 2020 (SOURCE: KGZS)

3.1. Guest structure

In 2019, Slovenia offered 59,905 rooms or 156,561 permanent beds on the tourism market - 25% in hotels, 2% in B&Bs, 3% in guesthouses, 5% in B&Bs, 17% in campsites, 3% in apartment resorts, 3% in youth hostels, 3% in tourist farms, 29% in private rooms and apartments, 4% in mountain chalets, 3% in holiday homes and 4% in other accommodation facilities (Strategija slovenskega turizma 2022-2028, 2022).

3.2. Economic indicators

Rural tourism can make an important contribution to improving the economy of rural regions: increasing gross product and employment - employment function, bringing new business opportunities, thus promoting the diversification of the local economy and opening up new markets for local products and services - Providing a new source of income and diversification of risk for working farmers and all those at risk from agrarian change (Bauman, 2017).

The positive economic impacts of tourism in rural local communities are also reflected in the improvement of general infrastructure (roads, utilities, telephony, electricity grid) and in the provision of public services (public transport, healthcare), thus improving the quality of life of the local population. It also contributes to the appreciation of (natural and cultural) assets (Bauman, 2017). In economic terms, tourism, therefore, has a multiplier function. This means that direct tourism consumption and income from tourism stimulate intensive economic activity and investment, which in turn triggers new economic activities. This, in turn, makes the local community more attractive to tourists and residents, as the value of real estate, local public goods and natural and cultural attractions increases (Bauman, 2017).

3.3. Guest demand and needs

Tourists typically seek out a tourist farm in order to relax, educate and actively engage in farm life. The activities on a tourist farm cover a wide range of activities, from food production to animal care, fieldwork, etc., which for tourist farms means an additional or complementary economic activity that brings extra income, actual physical help and spreads the risk or less dependence on only one activity on the farm (Bauman, 2017).

Within farm tourism, the following have become particularly interesting: nature-based tourism, eco-tourism and adventure tourism.

The typical profile of a tourist demanding rural tourism products is generally characterised by:

- Age between 39 and 59 years
- Higher education and higher income
- More travel experience
- Quality is more important than price
- Ecological awareness
- Choice of travel outside high season

There are three types of rural tourists: committed tourists, interested tourists and casual tourists (Bauman, 2017).

3.4. Digitalisation of the sector

Slovenian tourism is still at a relatively low level of development in terms of digitisation and connectivity of systems for decision support and tourism guidance. A significant number of tourism companies are lagging behind in the digitalisation of their operations and the regulation of their systems. However, it is more successful in following trends in digital marketing. There is a perceived lack of reliable and consistent information from linked existing databases needed to measure performance and further develop Slovenian tourism. Tourist destinations have not yet managed to establish comprehensive smart tourism solutions (Strategija Slovenskega turizma 2022-2028, 2022).

The introduction of smart digitalisation in Slovenian tourism is inevitable if we want to continue to improve the quality of services and experiences offered by Slovenian tourism, boost innovation, productivity and performance of Slovenian tourism companies, and support the further development of Slovenia. Digitisation should be integrated, linking all existing and new information, booking and statistical databases, and should be managed with the aim of effectively supporting the business, marketing, monitoring, planning, flow management and future direction of tourism development (Strategija Slovenskega turizma 2022-2028, 2022).

It is encouraging that the Recovery and Resilience Fund also provides funds for digitisation in tourism. In parallel with the development of the Slovenian Tourism Strategy 2022-2028, the Slovenian Tourism Organisation has been working on the Digital Transformation Strategy for Slovenian Tourism 2022-2026.

Comprehensive open platforms for improving and unifying the user experience at the level of tourist destinations will need to be established as soon as possible as a basis for smart destination applications (virtual tourist cards) (all tourism and tourism-related services in one place) with the possibility of integration into a national platform. The platform should also provide comprehensive analytics (data-driven) for further optimisation in the field of tourism offer planning, marketing and development of smart tourism destinations. The gradual integration of both public and commercial services (integrated services) aimed at both tourists/visitors and tourism locals will have to be ensured (Strategija Slovenskega turizma 2022-2028, 2022).

Tourist destinations are introducing very different digital solutions for displaying e.g. (tourist) cycling and hiking trails and panoramic routes/roads, the solutions are incompatible and the user experience varies widely from destination to destination. There is a need to harmonise the cartographic basis and to ensure openness and connectivity of data at the national level. Tourism companies are increasingly aware of the importance of digitisation and are

computerising their business processes and improving digital marketing in line with their capabilities, but are lagging behind in the deployment of digital solutions to support a better understanding of big data and, as a result, faster adaptation and improvement of all aspects of the tourism experience. It will be necessary to ensure the conditions for a comprehensive digital transformation of the tourism economy as soon as possible and to develop universal digital tools for efficient business process management, especially for smaller tourism providers (Strategija Slovenskega turizma 2022-2028, 2022).

In Slovenia, various measures (Recovery and Resilience Plan (NextGen), national funds and CAP interventions) or support will improve the digitalisation of processes, public data accessibility, greater interconnectivity of public data and the development of digital advisory tools. The use of digital technologies will be promoted across all regions, and investments in infrastructure and equipment of the agricultural advisory service and other public services and educational institutions are planned in the field of digitisation of tourism (Strategija Slovenskega turizma 2022-2028, 2022).

The pace of development of digitisation will certainly be affected by various external threats, such as the general fear of the population of the use of new technologies and digitisation in agriculture, combined with the danger, use and potential misuse of data. There are also risks related to the interpretation of data, conclusions and strategies in the case of open data by different stakeholders. There are also risks related to the uneven development of settlements and access to ICT and basic services, as well as the lack of coherence between development strategies and digitisation programmes at the national and local levels (CAP, 2023-2027).

Given that not all people in rural areas have access to ICT, improved access would increase ICT use and have an impact on economic activity, attracting investment, jobs and teleworking, reducing commuting and demographic structure. It is important that rural areas develop in a sustainable way. The Smart Villages concept and the circular economy (digital technologies, digital platforms providing key services such as e-learning, e-government, transport, social services, rural tourism, short value chains, cascading use of raw materials, social innovation in rural services and entrepreneurship) offer an opportunity to keep rural areas populated and to develop rural entrepreneurship (CAP, 2023-2027).

A well-developed supportive environment is the basis for the development of entrepreneurship and the creation of new quality jobs in rural areas. There is a strong increase in the number of young people taking up non-formal education and informal learning, which are likely to be key areas for future education policy development. A key source of informal learning is the Internet. The smaller size of rural enterprises than the national average also allows them to adapt more quickly to market conditions. Non-agricultural complementary

activities are an opportunity for additional income on farms. In 2020, most of the non-agricultural complementary activities are related to tourism. However, there is still potential to improve and develop high-quality and authentic tourism in rural areas. The rich cultural and natural heritage of the Slovenian countryside also has an impact on tourism development (CAP, 2023-2027).

While the digital communications infrastructure is working well in principle, we have been confronted with a complex problem of electronic services in the COVID-19 epidemic, both in terms of availability and the skills needed to use them and in terms of the quality of the user experience. The experience of the digital society during the COVID-19 epidemic provides valuable guidance for strategic planning of the future promotion of the digitalisation of Slovenia, in order to address the development gaps.

The following solutions are proposed in the framework of the overarching **Strategy for the Development of the Information Society in Slovenia by 2030**:

- **Digital “storytelling”**: Attractions provide experiences using digital hardware solutions such as touchscreens, projectors, 4D and 5D experiences, etc., and various applications that enable guided tours, audio guided tours, self-guided tours and itineraries, etc.
- **AR (Augmented Reality) solutions**: They offer visitors guidance and participation in the fields of entertainment, science, history and nature by changing their perception of the physical environment, providing them with a great experience and opportunities for interaction. AR solutions are available in different formats, e.g. as a tourist guide providing information to tourists. AR technologies can be implemented in major tourism products (museums, historical sites, city centres, etc.).
- **VR (Virtual Reality) solutions**: Encourage visitors to find and explore destinations and tourist attractions. Can be implemented in many tourism products such as museums, websites, etc.
- **E-tickets and smart pricing**. Offering centralised ticketing with a complete overview of purchase/booking trends, loyalty schemes with season tickets and memberships, and various add-ons offered directly during the booking process, such as guided e-tours or souvenirs.
- **The IT-tour event** is a proposed action aimed at raising awareness of the need for digital transformation among representatives of businesses, destinations and other key stakeholders in the tourism sector. The event would bring together stakeholders from the IT and tourism sectors.

- **The Tourism Digital Competence Voucher** is a tool to enable companies, destinations and other organisations in the tourism sector to co-finance training and digital competence development for their employees.
(Digitalna Slovenija 2030 – Krovna strategija razvoja informacijske družbe do leta 2030, 2023)

3.5. Non-formal and formal training opportunities in the field of agriculture

Education is now practically everywhere. It can be formal education to obtain a publicly valid certificate, it can be non-formal education for a profession or for social and personal development, or it can be purely informal education to inform, inform or stimulate people (Klodič, 2010).

Here are some of the larger, important educational programmes in Slovenia which contain an educational programme on rural tourism:

- **The Tourism on the Farm educational programme** was implemented to promote self-employment of hard-to-employ people, to educate the elderly to become more active in tourism or other associations, and to provide additional education for people already engaged in tourism activities. The training sessions began with an introduction to the geographical features, history and natural and cultural heritage of the Slovenian Highlands, which can be offered as an additional offer to guests. The training continued with a focus on the tourist farm. They studied the legislation and the conditions to be known in order to start a tourist activity on a farm. They also learned about the process of creating an offer, and how to identify the strengths and weaknesses of a home farm and a place. The selection of topics was based on the needs of the individual who would like to start a tourism activity on a home farm. The topics are also suitable for people who are already involved in tourism and want a more professional approach.
Link: <https://www.rasg.si/index.php/sl/turizem-na-kmetiji>
- **The Slovenian Chamber of Agriculture and Forestry** is also responsible for training, transferring knowledge from scientific fields into practice and facilitating access to the National Vocational Qualification Certificate.
Link: <https://www.kgzs.si/gospodarjenje/izobrazevanje>
- **Secondary School of Catering and Tourism**

- Link: <https://www.ssgt.si/>
- **CPI - Centre for Vocational Education of the Republic of Slovenia**
Link: <https://cpi.si/poklicno-izobrazevanje/strokovna-podrocja/gastronomija-in-turizem/>
- **Faculty of Tourism, University of Maribor**
Link: <https://www.ft.um.si/>
- **Faculty of Tourism Studies**
Link: <https://www.turistica.si/>
- **Abitura - Hospitality and Tourism Programme**
Link: https://www.abitura.si/studij/studijski-programi/visja-strokovna-sola-gostintvo-in-turizem/?gclid=CjwKCAjw_ihBhADEiwAXEazJr22Vxc-Fzq9tJOMGcMXd1LFQbnrUhXAQy1rW-MCHKNyJHTgVUBT0BoCjL0QAvD_BwE
- **Biotechnical Centre in Naklo**
Link: <http://www.bc-naklo.si/srednja-sola-in-gimnazija/strokovni-predmeti/hortikultura/kmetijstvo/turizem-na-podezelju/>
- **Platforms: goodplace.si, provital.si ...**

The Association of Tourist Farms was established in Slovenia in 1997 in accordance with the provisions of the Law on Associations and has the status of a public interest organisation, which is responsible for the joint appearance of tourist farms on the market, for the development of the offer, for the information and training of farm tourism operators and for the representation of the members' interests in the economic and legal spheres. The association offers its members: free advice on topical issues, monthly information on current events, free presentations at the association's trade fairs, cheaper publications in the association's promotional material, cheaper publications on the Internet, reduced or free training (computer courses, foreign language courses, communication with guests, etc.), free of charge. It also works to increase the visibility of the offer of tourist farms, to raise consumer awareness, to improve knowledge and to increase the liking for the offer of Slovenian tourist farms, thus ensuring a 200% increase in the occupancy rate compared to 1997. The association also works closely with other organisations around the country (Presentation of the association). (Združenje turističnih kmetij Slovenije, 2023).

4. Swot analysis

STRENGTHS	WEAKNESS
<ul style="list-style-type: none"> - Good geographical location - It offers a remarkable diversity of relief and landscape in a small area - Rich in water resources - High proportion of countryside (6,9 ha) - Good links with the countryside - Outstanding natural environment - Rich rural cultural heritage - Small farms mean greater adaptability to market changes - Half of the population lives in urban areas and half in rural areas - Well-developed road infrastructure (motorway crossroads) - Transit tourists are a potential for Slovenian tourism 	<ul style="list-style-type: none"> - Demographic changes are affecting - the emptying of the countryside - a reduction in labour supply - deteriorating economic picture - negative social trends - degradation of the cultural landscape - ageing population - low infrastructure and human capital - structural changes in the economy affecting services and globalisation - outdated railway infrastructure - poor air connectivity/accessibility - prohibitive infrastructure costs - price increases – inflation - seasonality of demand - employment instability - uncompetitiveness of the country - insufficient financial resources
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> - higher farm incomes from tourism, - new jobs on farms - preserving the settlement of the cultural landscape and our countryside - tapping into the social capital of the countryside (young people, pensioners, the educated and other rural dwellers) and existing networks. 	<ul style="list-style-type: none"> - Excessive infrastructure costs - price increases - risk of further deterioration of rural heritage - congestion in rural areas - long-term staff supply

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