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MATCHING TOURISM DEVELOPMENT PRIORITIES AND POLICY MEASURES – AN EXPERIMENTAL METHOD TO RECONCILE THE KEY STAKEHOLDERS' VIEWS

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Abstract

Purpose – To identify key literature-based tourism development assets and analyze their importance and performance (I/P) from the stakeholders' perspective in order to identify areas where improvements can be made by using appropriate policy measures.

Methodology – In the theoretical part of the paper, the relevant literature is reviewed and key assets for tourism development elicited. Through consultations with international tourism expert panel, the list of key assets is generated and used as the basis for importance-performance analysis (IPA). Furthermore, a list of smart, sustainable and inclusive policies was developed through the same process generated. The questionnaire including both lists was sent to key tourism stakeholders in Split-Dalmatia County (SDC), Croatia, to rate the I/P of attributes and impacts of the listed policies on increasing the tourism attractiveness of their respective area/micro region and the SDC itself. The survey is followed by a workshop with presentation, discussion and fine-tuning of results.

Findings – IPA reveals differences among assets that need to be prioritized for tourism development of the SDC's micro regions, but common threads are also identified. Furthermore, required policy measures from stakeholders' perspectives are also generated.

Contribution – Theoretically, this study synthesizes relevant literature on tourism development assets and generates the list of most relevant assets based on expert panel consultations. The list was the basis for the empirical study conducted through the survey and a workshop. Practically, this study identifies assets/areas that need to be (de)prioritized and generates policy measures for future development of tourism, the most important economic activity in SDC.

Keywords territorial assets, attractiveness, importance-performance analysis, stakeholders' perception

INTRODUCTION

The concept of territorial attractiveness provides important insights into the development potential of places. However, the very presence of assets, no matter how important they may be, does not necessarily mean that they will yield significant development results if the favourable economic environment is not in place (Servillo et al., 2011). It is generally believed that identifying destination's development priorities involves identifying the assets/attributes that tourists and destination managers consider as important in evaluating the attractiveness of a destination (Reitsamer & Brunner-Sperdin, 2017; Vengesai et al., 2009). Furthermore, the tourism literature recognizes that different stakeholders influence tourism development in many ways (e.g., via tourism supply,

demand, regulation, impacts management, human resources and research; Waligo et al., 2013). With tourism being the most significant economic activity in Croatia, very little is known about the attractiveness of Croatia's assets/attributes from the perspectives of different stakeholders. Thus, the goals of this study are to theoretically and empirically analyze different territorial assets which determine tourism attractiveness, as well as to identify perceptions of stakeholders in Split-Dalmatia County (SDC) in Croatia about these assets and impacts of selected tourism policies on tourism attractiveness.

1. LITERATURE REVIEW

1.1. Tourism development assets

Tourism literature on destination attributes and destination attractiveness falls into one of the following three categories: demand-side, supply-side, and demand-and-supply-side evaluations. The demand-driven approach is based on the assumption that "the travel destination reflects the feelings, beliefs, and opinions that an individual has about a destination's perceived ability to provide satisfaction in relation to his or her special vacation needs" (Hu and Ritchie, 1993, p. 25). The supply-side considers attractiveness as the drawing force generated by all of the attractions present in a destination at a particular moment (Kaur, 1981). The combined approach is based on the assumptions that "demand-and-supply factors collectively and simultaneously influence the production and development of tourism goods and services, and that the components of demand and supply generate the tourist experience" (Formica and Uysal 2006, 419).

A number of studies identify the dimensions and attributes of destination attractiveness. For example, Reitsamer and Brunner-Sperdin (2017) identify two dimensions of destination attractiveness: sense-making (accessibility, amenities) and exploratory (entertainment, local community). Krešić and Prebežac (2011) identify accommodation and catering, activities in destination, natural features, destination aesthetics, environmental preservation, and destination marketing as part of an index of destination attractiveness. Lee et al. (2010) identify four dimensions: tourist attractions (natural resources, cultural assets), accessibility (external access, internal access), amenities (lodging and catering, recreation facilities), and complementary services (information services, safety and sanitation). Vengesayi et al. (2009) identify three dimensions: destination attractions (created attractions, historical attractions, unique attractions, natural attractions, recreation facilities, physical environment), destination support services (accommodation facilities, destination utilities, communication facilities, destination accessibility), and people-related factors (attitude towards tourists, physical risk, health risk, customer service, residents' support for tourism).

Cracolici and Nijkamp (2008) list the following attributes: reception and sympathy of local residents; artistic and cultural cities; landscape, environment, and nature; hotels and other accommodations; typical foods; cultural events (concerts, art exhibitions); price levels, living costs; quality and variety of products; information and tourist services; tourist safety; and wine quality. Formica and Uysal (2006) pinpoint tourism services and facilities, cultural/historical, rural lodging and outdoor recreation. Ritchie, Crouch and Hudson (2000) identify core resources and attractors (physiography and climate, culture

and history, market ties, mix of activities, special events, entertainment, superstructure) and supporting factors and resources (infrastructure, accessibility, facilitating resources, hospitality, enterprise). Methodologically, the majority of studies on destination attractiveness employ an exploratory approach based on visitor surveys, expert interviews, panel data or secondary data analysis.

Alternatively, the analysis of attractiveness can be based on the territorial capital concept, proposed in the regional policy context by the OECD (2001) and formalized in theoretical terms by Camagni (2008). Territorial capital is defined as the system of territorial assets of economic, cultural, social and environmental nature that ensures the development potential of places (Perucca, 2014).

Servillo et al. (2011) offer a dynamic perspective on territorial capital highlighting its two aspects: (1) definition and (2) mobilization which plays a crucial role in achieved different performances between places. Thus, they argue that attractiveness is built through combination and interaction of different assets and from the way they are mobilized by governmental and non-governmental organizations and by institutional actors. In this study, we adopt his view and see territorial capital as a crucial dimension of the attractiveness, as adopted in the ATTREG model (ESPON, 2013). Thus, territorial assets that describe regional attractiveness are composed of: (i) *antropic* capital (built environment, monuments and landmarks, quality of housing, architecture, infrastructure, hotels, etc.); (ii) *environmental* capital (geographical and landscape characteristics, landscape quality, natural resources, protected landscapes, green areas, rural areas and/or settlement structures, climate, etc.); (iii) *economic* capital (firms and sectors, level of economic activity, employment, networks and clusters, innovativeness, investments, centrality, etc.); (iv) *human and social* capital (education levels, diversity of population, social networks, gender and ethnic participation, crime, etc.); (v) *cultural* capital (cultural activities, infrastructure and services, higher education institutions, academic production, etc.); and (vi) *institutional* capital (democracy, efficiency of the system, tax climate, participatory processes, accessibility, etc) (ESPON 2013, 16). The institutional capital has a dual status, being an attractiveness element and a prerequisite for assets mobilization (Servillo et al., 2011).

The tourism literature relates to different stakeholder types, which can be grouped into six broad categories - tourists, industry, local community, government, special interest groups and educational institutions. They influence tourism development in many ways, including tourism supply and demand, regulation, the management of tourism impacts, human resources and research (Waligo et al., 2013). Presenza et al. (2013) posit that stakeholders' perceptions of tourism development and its potential future directions are an important precondition for decision-making and support, whilst it was found that stakeholders' attitudes toward tourism development differ (Kuvan and Akan, 2012; Alonso and Alexander, 2017), even within initially homogenous groups (Ven, 2015). Stakeholder-driven planning is recognized as relevant for destination strategic development (Inskip, 1991) and marketing (Heath and Wall, 1992) and requires the involvement of various stakeholders (Getz and Jamal, 1994; Ritchie and Crouch, 2003). Thus, the aim of this study is to investigate how key government, industry and special interest stakeholders perceive the importance and performance of selected destination attributes and priority of selected tourism-related policies.

1.2. Importance-performance analysis – overview and usage in tourism research

Importance-Performance Analysis (IPA) is a widely used methodological tool in tourism literature (Lai and Hitchcock, 2015). This popularity stems from IPA's simple graphic representation of data that is easily interpreted (Murdy and Pike, 2012) and valuable for the management of tourism destinations (Taplin, 2012). Although initially introduced by Martilla and James (1977) as a framework for understanding customer satisfaction, it is often used to distinguish discrepancies between what stakeholders' think is an important component of a specific issue and their actual perceptions of how well the issue is being managed (Lai and Hitchcock, 2015; Oh, 2001). This is performed by plotting the mean grades of selected attributes' importance and performance in a coordinate system (Figure 1) with the resulting four-quadrant matrix identifying areas needing improvement and those of effective performance (Skok et al., 2001).

Figure 1: The 'importance-performance' grid

<p>Quadrant 1 – POSSIBLE OVERKILL</p> <p>Resources being allocated and above average performance achieved in attributes not perceived important - possible overuse of resources</p>	<p>Quadrant 2 – KEEP UP THE GOOD WORK</p> <p>Attributes of above average importance and performance - need to be maintained at adequate level/quality.</p>
<p>Quadrant 3 – LOW PRIORITY</p> <p>Lower priority attributes - resources not being channelled towards them, and should stay so</p>	<p>Quadrant 4 – CONCENTRATE HERE</p> <p>Attributes of above average importance not being performed to the same standard. Efforts should be made to shift them to Quadrant 2.</p>

Source: adapted from Murdy and Pike (2012)

Most IPA studies in tourism are demand oriented i.e. focus on a certain experience, service, or product and how well a business or destination is meeting the tourists' expectations (Chu and Choi, 2000; Coghlan, 2012; Taplin, 2012; Sheng et al., 2014; Chen, 2014). Other studies, including this one, have taken a supply-side approach exploring the attitudes of experts within the destination to evaluate the importance and performance of different factors leading to the competitiveness of the destination (Murdy and Pike, 2012; Dwyer et al., 2012; Griffin and Edwards, 2012;) or the hospitality industry (Cvelbar and Dwyer, 2013) or residents (Frauman and Banks, 2011; Boley et al., 2017).

2. EMPIRICAL RESEARCH

2.1. Study region - Split-Dalmatia County, Croatia

Split-Dalmatia County (SDC) is one of Croatia's 21 counties, situated in the middle of the nation's Adriatic coastline, with a land area of 4,540 square kilometres, a population of around 450,000 (11% of Croatia's population and 8,1% of the country's GDP), and population density of 100 per square kilometre. Administratively, SDC comprises 16 cities and 39 municipalities. The city of Split, the county seat of SDC, is both the county's

largest city and Croatia's second largest city, with approximately 190,000 residents (just over 300,000 inhabitants in SDC's metropolitan area; Croatian Bureau of Statistics, 2017).

SDC consists of three micro regions: a large but scarcely populated hinterland (nested between the coastal strip and the country border with Bosnia and Hercegovina), a narrow coastal strip with high population density, and the islands. SDC is characterized by the Mediterranean climate on the coast and islands, and by the sub-Mediterranean and mountain climate in the hinterland.

In 2017, SDC recorded 3.2 million visitors and 16.94 million overnights, of which 2.96 million were foreign nationals with 15.94 million overnights (Split-Dalmatia County Tourism Board, 2018). In the same year, SDC had approximately 225,000 beds in 26,600 lodging establishments, of which 156,500 beds (70%) in 24,900 vacation rentals, 32,600 beds (14.5%) in 253 hotels, 14,300 beds (6%) in 53 campgrounds, and 21,000 beds (9%) in 1,400 other types of lodging establishments. Geographically, almost all lodging capacity is located in the coastal strip and islands, with very few beds in the hinterland.

2.2. Methodology

In this study, a literature review of destination attributes/assets was performed ending in a pool of those relevant for Mediterranean destinations. Through several iterations of expert panel consisting of international tourism researchers, the list was reduced to 26 destination attributes which were incorporated in the 5-point Likert scale IPA survey instrument. Furthermore, a list of adequate policy measures was generated through a thorough analysis of EU, Croatian and SDC strategic documents. The 27 policies selected were oriented towards the fulfilment of smart, sustainable and inclusive growth defined by the Europe 2020 strategy.

In order to select the stakeholders, the model of the tourism system proposed by Inskeep (1991) was used. According to the model, the list of 30 key tourism stakeholders (at both the county level and the level of each of the SDC's three micro regions) that have legitimacy for representing the different sectors relevant for tourism (the accommodation sector, the transport sector, the tourist attractions and activities, public government and DMO) was generated. The survey questionnaire was sent to stakeholders in April 2015. They were asked to evaluate importance and performance of specific assets in their regions and to prioritise the policies listed in terms of increasing their tourism attractiveness. The data collection lasted 30 days, yielding 21 valid responses. A few weeks after the data collection phase, the respondents were invited to a workshop where results were presented and discussed. Here the aim was to review any possible gaps between the IPA-revealed priorities and policy measures they (i.e., the respondents) prioritized.

2.3. Results

Performance and importance means for all attributes were calculated and plotted (importance along the x and performance along the y-axis). The cross-hairs can be placed at the researchers' discretion, in terms of providing the greatest insight (Murdy and Pike, 2012). Options are scale-centred approach Martilla and James (1977 (cross hairs at I and P median values) and data-centred approach (at I and P mean values) (Boyen et al., 2017). The latter was adopted as it compares attributes relative to each other (Taplin, 2012), ensures more dispersion across the four IPA grids and clearer managerial implications (e.g. Bruyere et al., 2002). A third option, applied as well, is inclusion of an upward sloping 45° diagonal line. That is the iso-rating or iso-priority diagonal line (Bacon, 2003; Azzopardi and Nash, 2013), where importance equals performance (Magal and Levenburg, 2005). All points on the line have the same priority for improvement while the area below the line is the region of opportunities and large distances (gaps) are identified as areas of priority for improvement (Slack, 1994; Bacon, 2003; Skok et al., 2001). This is especially useful in identifying the priorities in Quadrant 2 (Keep up the good work) as it allows researchers to identify attributes which have positive ($P > I$) and negative disconfirmations ($I > P$) (Sever, 2015).

The priority activities that the policy measures need to concentrate upon are found in Q4 (Concentrate here) and in Q2 in area beneath the iso-rating line. The attributes in Q1 and Q3 need to be addressed as well, but as the aim of this paper is the investigation of adequate priority policies and scope, we shall focus only on Q4 and Q2 and discuss them in next section. As presumed, attributes' positioning within the four quadrants differs significantly among the 4 sub regions, reflecting their specifics (Table 1).

Table 1: Number of attributes' within Quadrants

	Q1	Q2	Q3	Q4
Islands	3	10 (3) ¹	7	6
Coast	5	9 (5)	9	3
Hinterland	6	9 (5)	5	6
County	3	6 (5)	11	6
Total	17	34 (18)	32	21

Source: research

To enable the regional prioritizing, attributes which "landed" in the same quadrant in all four areas were identified (Table 2).

¹ The number in parenthesis stands for the number of attributes beneath the iso-rating line.

Table 2: IPA grid of common elements/attributes in all 4 sub-regions²

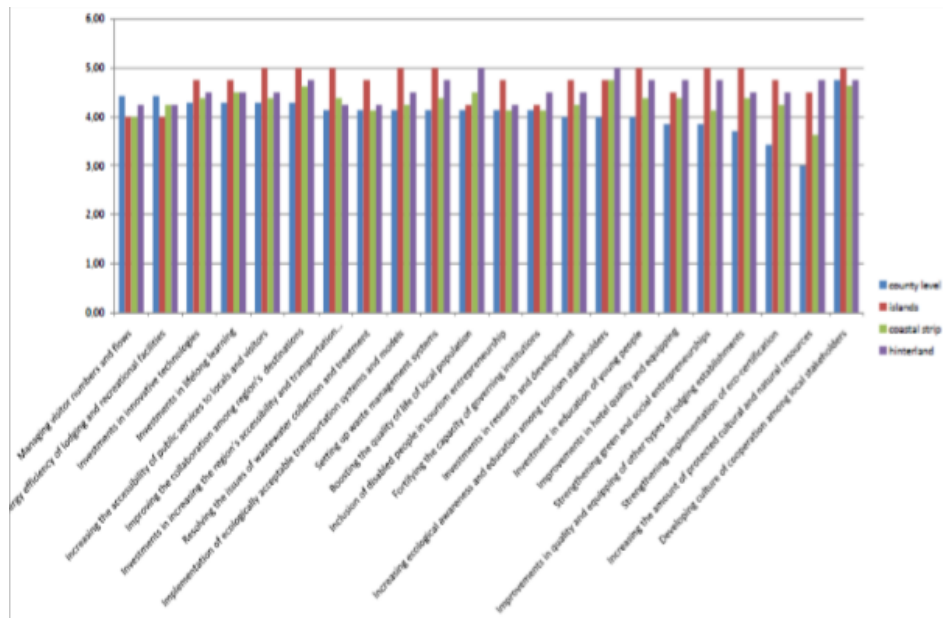
<p>Possible overkill:</p> <ul style="list-style-type: none"> • Positive destination image (3) • Pleasant climate (3) • Quality of accommodation (2) 	<p>Keep up the good work:</p> <ul style="list-style-type: none"> • Well preserved cultural landscape (4) • Personal safety (4) • Authenticity (3) • Friendly and hospitable local people (3) • Attractive natural landscape (4) • Historical monuments and sites to visit (3) • Interesting small towns and villages / rural countryside (3)
<p>Low priority:</p> <ul style="list-style-type: none"> • Number of year-round flight routes to destination (3) • Strong political commitment for tourism (3) • Quality of health and wellness facilities (3) • Cooperation among destinations in the region (3) • The existence of management plans for crises and catastrophes (3) • Variety of entertainment opportunities (2) • Quality of infrastructure (2) • Common values and vision among the stakeholders (2) 	<p>Concentrate here:</p> <ul style="list-style-type: none"> • Responsible use of destination's resources (3) • Quality of transport and transportation facilities at the destination (3) • Value for money (2) • Common values and vision among the stakeholders (2)

Source: research

Furthermore, the results of smart, sustainable and inclusive policies rating were analysed (Figure 2).

² The number stands for the number of regions in which the attribute is found.

Figure 2: **Comparative analysis of different policies' impact on tourism attractiveness**



Source: research

In order to unveil if policies prioritized by stakeholders fit with the priority areas/attributes identified indirectly through IPA, a matrix of results of these three set of questions was generated (Table 3).

Table 3: **The priority attributes and policy measures matrix**

		Attributes	Policy measures
Islands	Q4	<ul style="list-style-type: none"> ▪ Number of year-round flight routes to a destination ▪ Quality of health and wellness facilities ▪ Quality of transport and transportation facilities at the destination ▪ Destination's distance to main visitor markets ▪ Value for money ▪ Responsible use of destination's resources 	<ul style="list-style-type: none"> ▪ Investments in innovative technologies ▪ Investments in lifelong learning ▪ Increasing the accessibility of public services to locals and visitors ▪ Improving the collaboration among region's destinations ▪ Investments in increasing the region's accessibility and transportation interconnectedness ▪ Implementation of ecologically acceptable transportation systems and models

		Attributes	Policy measures
	Q2 ³	<ul style="list-style-type: none"> ▪ Friendly and hospitable local people ▪ Personal safety ▪ Well-recognized destination brand 	<ul style="list-style-type: none"> ▪ Setting up waste management systems ▪ Developing culture of cooperation among local stakeholders ▪ Strengthening implementation of eco-certification
Coast	Q4	<ul style="list-style-type: none"> ▪ Variety of entertainment opportunities ▪ Quality of transport and transportation facilities at the destination ▪ Common values and vision among the stakeholders 	<ul style="list-style-type: none"> ▪ Developing culture of cooperation among local stakeholders ▪ Increasing ecological awareness and education among tourism stakeholders ▪ Investments in lifelong learning ▪ Improving the collaboration among region's destinations ▪ Investments in increasing the region's accessibility and transportation interconnectedness ▪ Boosting the quality of life of local population ▪ Investments in innovative technologies ▪ Increasing the accessibility of public services to locals and visitors ▪ Setting up waste management systems
	Q2	<ul style="list-style-type: none"> ▪ Well preserved cultural landscape ▪ Friendly and hospitable local people ▪ Destination accessibility ▪ Value for money ▪ Positive destination image 	
Hinterland	Q4	<ul style="list-style-type: none"> ▪ Variety of events ▪ Value for money ▪ Well-recognized destination brand ▪ Cooperation among destinations in the region ▪ Common values and vision among the stakeholders ▪ Responsible use of destination's resources 	<ul style="list-style-type: none"> ▪ Increasing ecological awareness and education among tourism stakeholders ▪ Boosting the quality of life of local population ▪ Setting up waste management systems ▪ Strengthening green and social entrepreneurships ▪ Increasing the amount of protected cultural and natural resources ▪ Improving the collaboration among region's destinations ▪ Developing culture of cooperation among local stakeholders ▪ Improvements in hotel quality and equipping ▪ Investment in education of young people
	Q2	<ul style="list-style-type: none"> ▪ Well preserved cultural landscape ▪ Pleasant climate ▪ Authenticity ▪ Friendly and hospitable local people ▪ Personal safety 	

³ beneath iso-rating line

		Attributes	Policy measures
County	Q4	<ul style="list-style-type: none"> ▪ Unique local cuisine / varied gastronomy ▪ Authenticity ▪ Quality of accommodation ▪ Friendly and hospitable local people ▪ Quality of transport and transportation facilities at the destination ▪ Responsible use of destination's resources 	<ul style="list-style-type: none"> ▪ Developing culture of cooperation among local stakeholders ▪ Managing visitor numbers and flows ▪ Increasing the energy efficiency of lodging and recreational facilities ▪ Investments in innovative technologies ▪ Investments in lifelong learning ▪ Increasing the accessibility of public services to locals and visitors ▪ Improving the collaboration among region's destinations
	Q2	<ul style="list-style-type: none"> ▪ Interesting small towns and villages/ rural countryside ▪ Attractive natural landscape ▪ Well preserved cultural landscape ▪ Destination accessibility ▪ Personal safety ▪ Value for money 	<ul style="list-style-type: none"> ▪ Inclusion of disabled people in tourism entrepreneurship ▪ Strengthening the capacity of governing institutions

Source: research

DISCUSSION AND CONCLUSIONS

Owing to different territorial capital (i.e., potential assets), the IPA matrix are, expectedly, different for all areas studied. Thus, for Coast, the most developed tourism area, the least attributes are found in Q4 - *Variety of entertainment opportunities*, *Quality of transport in destination* and *Common values and vision among the stakeholders* whilst in all other areas six attributes are in Q4. For comparison, Hinterland, the area where tourism is least developed, *Well-recognized destination brand* and *Cooperation among destinations in the region* are in Q4 and out of six of them only one overlaps with Coast - *Common values and vision among the stakeholders*.

As many policy measures are regionally and nationally implemented, unveiling common denominators of priority attributes were perceived as an important empirical and policy contribution in this study. Thus, two attributes were identified in Q4 for most areas. The first, *Quality of transport and transportation facilities in destination*, was revealed in all areas except Hinterland. This can be explained by the fact that the area is not densely populated nor is it attracting substantial tourism flows thus is the transport system more than adequate for the present usage. On the other hand, rather unexpected, *Responsible use of destination's resources* is in Q4 for all regions except Coast. This finding can be perceived as a warning signal, as this area is under high tourism and population pressure. The other attributes from Q4 are *Value for money* (in Hinterland and Islands) and *Common values and vision among the stakeholders* (in Hinterland and Coast).

The other important quadrant to consider is Quadrant 2 (Keep up the good work) i.e. the attributes positioned underneath the iso-rating line and thus needing improvement. Here again, individual differences are found, and the number of these attributes ranges from

three (Islands) to six (County). However, common ones are identified as: *Personal safety* (except Coast), *Friendly and hospitable local people* (except Coast where it is in Q4), *Well preserved cultural landscape* (except Islands). Also to be noted are *Value for money* and *Destination accessibility* (both at Coast and County level). As the *Value for money* is found in Q4 in the other two regions, it is to be perceived as the top priority attribute. If attributes found in these two priority Quadrants are taken as overall priorities, two are identified as being crucial in all areas studied – *Value for money* and *Friendly and hospitable local people*.

As per the policies ratings, the data analysis revealed that all respondents have rated all policies (i.e. their impacts) as being highly important for tourism attractiveness of the area they were assessing. Again as expected, differences between the ratings of specific policies among areas were found. Looking at the areas studied in more detail, respondents from Islands perceive most of the policies rather equally important. Still, policies that enhance infrastructural (accessibility) and environmental assets, as well as the culture of cooperation were rated with maximum grade revealing that measures against “isolation” are priority. Respondents from Coast who have been living with tourism for decades are very much aware of the costs and benefits it produces, prioritizing cooperation, ecological awareness and quality of life. Their Hinterland counterparts have given high marks to almost all policies which can be explained by low development level of this area. Finally, County level respondents have proved to see the “wider picture” giving priority mostly to policies that enable optimal system functioning.

Finally, in relating the findings of IPA and policy priorities, mostly a match is found. For example, Islands priorities of year-round flights, quality of transport and distance from source market are well aimed by prioritized policies - increasing the accessibility of public services to locals and visitors, investments in increasing the region’s accessibility and transportation interconnectedness and so is *Responsible resources use* by implementation of ecologically acceptable transportation systems and models, waste management systems and implementation of eco-certification whilst *Value for money* and *Friendly and hospitable local people* can be achieved by prioritized investments in lifelong learning. However, mismatches were revealed as well. In Hinterland, quality of accommodation was not identified as priority, while improvements in hotel quality and equipping were a priority policy. At County level, *Destination accessibility* is perceived as needing improvement while investments in increasing the region’s accessibility and connectedness is not seen as priority. Although *Responsible resources use* was not identified as priority on the Coast, increasing ecological awareness and education among tourism stakeholders and waste management systems are perceived as priority policies. Another mismatch is that stakeholders from all regions gave the highest ranks to policies for development of cooperation culture among local stakeholders and improvement of collaboration among region’s destinations. This is quite logical for Hinterland where attributes *Cooperation among destinations in the region* (3) and *Common values and vision among the stakeholders* (2) are both positioned in Q4 and the latter also for Coast. However, in all other regions these two attributes are positioned in Low priority quadrant. The highest priority given to these policies shows that social networks and cooperation are perceived to be crucial conditions for tourism development in SDC. All the mismatches were discussed at the workshop where many valuable inputs of

qualitative nature were generated. Thus, the experimental method proved to be useful in the obviously highly complex process of identifying tourism development priorities.

The study presented is not free of limitations, these being (i) the list of assets and policies, although both expert derived and agreed upon, is potentially biased and “relative” (ii), the same applies for the survey tool based on subjective perceptions, (iii), limitations of the methodological tool used, specifically relevant here, the issue of interpretation of attributes in close proximity to discriminating thresholds (Bacon, 2003; Boley et al., 2017) and (iv) the sample size.

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