

# Mystery Shopper Training in Tourism and Hospitality Education: An Interdisciplinary Approach

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**Abstract:** This paper puts forward two pedagogical initiatives involving practical research projects grounded in the Mystery Shopper methodology. Designed to align with the evolving demands of hospitality and tourism management, these initiatives aimed to bridge theoretical learning with hands-on application, enabling students to develop essential managerial, observational, and evaluative competencies. By engaging as mystery guests in real-world restaurant settings and tourist attractions, students assumed the role of consultants, identifying service inconsistencies and proposing evidence-based improvements within the scope of different courses. These initiatives emerged from a faculty-led project aimed at promoting pedagogical innovation and applied research, by fostering student engagement through relevant, experiential learning. They sought to fulfil several pedagogical goals, including understanding the significance of the Mystery Guest approach, identifying criteria for service quality, and reinforcing theoretical knowledge from different subjects. Additionally, they emphasized collaborative learning, communication skill development, and interaction with industry stakeholders. In addition to framing the methodology and providing examples within the scope of hospitality and tourism, authors outline the two initiatives – one focusing on restaurants and another on artists ateliers included in tourist itineraries – describing their implementation and reflecting on their affordances. Combining service training with observational research, both initiatives were successful in involving students as both participant observers and active research agents in the design and implementation of evaluation tools, having highlighted the value of integrating applied research into tourism education, promoting critical thinking, reflective practice, and stronger alignment with market needs.

**Keywords:** Checklists, Interdisciplinarity, Mystery Shopper; Observational Research, Tourism Education

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## 1. Introduction

As interdisciplinary and experiential approaches are becoming more relevant within the scope of tourism education, with institutions seeking to bridge the gap between theoretical and practical learning and reinforce industry-academia collaboration (Forristal, 2022; Costa et al., 2023; Melo, Mouta & Pereira, 2023), there is a growing interest in promoting initiatives that combine and crosscut these domains. Based on this premise and focussing on the Mystery Guest methodology – a widely adopted industry practice that remains underexplored in educational contexts – this paper describes two innovative pedagogical initiatives that combine service training with applied research activities within this scope.

Aiming to embed the Mystery Guest methodology into structured learning environments, both projects were developed in close collaboration with industry stakeholders, having relied on observational methods to engage students as both participant observers and active research agents, challenging them to work in real-world hospitality settings by taking on the role of customers/guests/visitors. Following an introductory stage, in which they were introduced to the methodology and the key concepts of service delivery, students selected different research objects (i.e., restaurants or ateliers) having developed checklists to be used in their visits, as to support their observation and data collection and ensuing assessment and development of recommendations for improvement.

These learner-centred activities, which reflect the principles of experiential learning (Kolb, 1983, Rosenkranz, 2021; Vasconcelos et al., 2024), were supported by faculty facilitators and are aligned with current academic paradigms that advocate for research-based and research-oriented learning (Healey, 2005; Quintela & Durão,

2022), at the same time they address industry demands for graduates who are equipped with applied research skills and who can translate academic knowledge into practical competencies (Smith, Butcher, Litvin & Frash, 2015).

The following sections will provide a more detailed overview of the methodology, and the activities carried out within the scope of both projects, putting forward the frameworks used, as well as a brief description of their implementation and the challenges faced both by students and faculty. The final section will describe the key takeaways and plans to further develop the projects, reflecting on their affordances when it comes to developing students' awareness regarding research methodologies and their manifold applications.

## 2. Context and Methodology

This paper describes two different projects developed at the School of Hospitality and Tourism (ESHT, Portugal), one focussing on the restaurants/catering sector, and another dealing tourist activities, most specifically, an initiative designated "Curated Porto: Creative Itineraries, which integrates art studios and ateliers. Despite their differences, as they involved students from different programmes and courses, both projects shared the same principles, having resorted to a common approach to foster students' research and critical thinking skills. Stemming from the need to foster pedagogical innovation and encourage applied research activities, the shared conceptualization process originated from a group of teachers who felt the need to foster pedagogical innovation and encourage applied research activities, which could be perceived as relevant and engaging by students and showcase the practical application of different research dimensions and methods.

In both cases, students were challenged to carry out research activities based on the mystery shopper methodology, bearing in mind specific learning outcomes and goals. In addition to developing key transferrable skills such as teamwork, collaboration and communication, students were, therefore, expected to: 1) gain a deeper understanding of the purpose and importance of mystery shopper methodology in hospitality and tourism; 2) identify key service quality criteria to be applied in specific contexts; 3) apply and crosscut content from different courses; 4) become aware of the relevance of applied research within the scope managerial and tourism and hospitality education; and 5) gain insights into industry standards and quality benchmarks.

Even though the origins of mystery shopping trace back to the 1940s (Beck, Lalopa & Hall, 2004) and that the concepts related to quality assurance and operational standardization are consistently discussed within the context of tourism and hospitality education and training (Anantharajah, Lin, & Tian, 2020) the topic of mystery shopping is often relegated to a minor component within programs, with very little information being available on the training of mystery shoppers (Beck, Lalopa & Hall, 2004). Nevertheless, considering that many companies, including major international hotel chains often resort to this methodology, and that it is perceived as being comprehensive and cost-effective (Mathe & Slevitch, 2011), making it possible to collect a large amount of information (Oronsky & Chathoth, 2007) and "observe service in its natural setting" (Dutt, Hahn, Christodoulidou & Nadkarni, 2018, p. 473), it is important that tourism and hospitality students develop a working understanding of its potential as part of their training (Anantharajah, Lin, & Tian, 2020).

Moreover, despite its relevance and perceived potential, the methodology's application in pedagogical contexts remains underexplored, with this gap being made more evident by the increasing market demand for graduates capable of transferring and applying academic knowledge in practical, workplace contexts (Smith, Butcher, Litvin & Frash, 2015, p. 265), making a case for the development of applied educational projects that cultivate skills such as observation and critical thinking (Smith et al., 2015; Quintela & Durão, 2022). Based on these assumptions, and the idea that, in order to develop managerial skills, students must first acquire practical know-how and have a working understanding of different work settings (i.e., various sectors and departments and how they operate) the projects described in this paper aimed to support the use mystery shopper methodology, having drawn on different stages research process in this scope (Liu et al., 2014; Turner, 2012).

The mystery shopper research process involves several key phases. The first phase – Phase 1 – involves the definition of specific research objectives that align with the client's goals (i.e., you must determine what will be assessed and with what purpose) (Lai & Chang, 2013; Liu et al., 2014). Phase 2 – Planning and Design – involves target/location selection. Within the scope of the projects two different methods were used – for Project 1:

"MyGuESHT - Mystery Guests Real Insights: Application of Mystery Guest Technique in a Food and Wine Service", students used the digital platform "The Fork" to select the establishments to be audited, whereas in Project 2: Project 2: "MyGuESHT - Mystery Guests Real Insights: Application of Mystery Guest Technique in a Creative Tourism Itinerary", the potential targets were pre-selected, as they encompassed all the artists/ateliers integrated in the "Curated Porto: Creative Itineraries" project, which involved a partnership with the Porto Tourism Council (PTC). Bearing in mind span and scope of both projects, there were slight adaptations to the research processes' implementation, notwithstanding the compliance with the work of Liu et al. (2014). The existence of previously defined criteria and categories provided consistency and supported the ensuing

discussing on the observation criteria and checklists to be developed and used by the students, with the support of faculty members (acting as facilitators). These checklists followed a three-tiered structure, based on framework proposed by Liu et al. (2015), considering the pre-visit, visit, and post-visit phases.

Following the discussion and validation of the checklists, students carried out their assessment, having visited the target locations posing as customers (Phase 3). Based on the introductory seminar on the methodology, students were free to design different scenarios and take on different personas, depending on their goals. The specific phases and approaches which will be further explained in the following section, as will the debriefing process (Phase 4 – Wrap up).

## **2.1 Project 1: “MyGuESHT – Mystery Guests Real Insights: Application of Mystery Guest Technique in a Food and Wine Service”**

The Interdisciplinary Project MyGuESHT – Mystery Guests Real Insights: Application of Mystery Guest Technique in a Food and Wine Service” was carried out with 2nd year Hotel Management and Restaurant and Catering Management undergraduates (first semester – 2024/2025). The project focused on the mystery guest methodology as a catalyst for active learning in the field of food and wine service. The project aimed to foster students’ awareness towards mystery guests and the role this methodology can play in the field of food and wine service, while raising their awareness and support the development of creative, critical thinking and research skills through the identification of operational gaps and the proposal of sustainable and operational solutions. Having been implemented in the School of Hospitality and Tourism (Polytechnic of Porto, Portugal), the project was divided into four phases:

- Phase 1 – Objective definition
- Phase 2 – Planning and Design
- Phase 3 – Implementation
- Phase 4 – Wrap-up

The initial phase of the project consisted in the systematic definition of objectives, evaluation parameters, and data collection tools designed to assess service quality. This stage encompassed collaborative planning sessions, the development of guiding documents and templates, as well as the establishment of appropriate assessment methodologies.

Considering the cross-disciplinary and cooperative character of the project, Phase 2, Planning and Design, began with an initial joint session and the formation of work groups. This kick-off session aimed at defining the overall objectives, implementation stages and deadlines, all of which were negotiated with students. Throughout the process, several collaborative initiatives were undertaken, including technical visits and audit simulation activities designed not only to support and inspire students, but also to foster a reliable support network. Drawing on the work of Dutt et al. (2018), who carried out an extensive review on the most common requirements for Mystery Shoppers, the initial phases of the project focussed on developing training-related elements such as Anonymity, Reporting, Data Collection Skills and Industry Knowledge. As for implementation (Phase 3) it was divided into three stages: pre-visit, visit, and post-visit.

### *2.1.1 Pre-visit*

In line with the sequential phases typically associated with mystery shopper research (Liu et al., 2014; Turner, 2012), this preliminary step involved the articulation of each group's research objectives. The design of the assessment checklist followed a triangulated methodological approach, integrating three key sources. Firstly, the model advanced by Liu et al. (2015), which outlines the evaluation standards used by Michelin inspectors during mystery client assessments. Secondly, the research design of Linderová et al. (2019), which employed the same methodology within a broader project focused on evaluating service quality in the restaurant sector. Thirdly, a practitioner-based resource in the form of a 40-step operational guide, proposed by faculty mentors, was also incorporated. Input from student-led discussions further enriched the development process. This

iterative, collaborative process culminated in a multi-layered and adaptable evaluation tool, suitable for diverse hospitality contexts.

Following the design stage, each group selected a restaurant for evaluation. This task was facilitated by the use of the digital platform The Fork, which ensured methodological consistency while allowing filtering based on typology, price range, and other relevant criteria. Once the venues and goals were defined, the groups

formulated customised evaluation checklists aligned with their research focus. These instruments were subsequently reviewed and refined through consultations with academic mentors and professionals in the field.

### 2.1.2 Visit

After receiving targeted training in observation and data collection—delivered through role-play simulations in a controlled learning environment – students engaged in on-site evaluations. Acting as standard customers, they visited the selected establishments and observed the complete service sequence in real time. While maintaining adherence to the predefined assessment criteria, groups were encouraged to experience distinct scenarios of service interaction. Immediately following each visit, they documented their findings using the standardised checklists, which enabled the collection of both qualitative data (through narrative descriptions) and quantitative data (via numerical scoring), thereby ensuring a comprehensive and systematic assessment of the service experience.

### 2.1.3 Post-visit

Following the visits, students produced an analytical report that included a description of the experience, an analysis of the data collected, and the identification of strengths and areas for improvement. The purpose of the report was to foster written communication skills and critical synthesis, fundamental pillars in hospitality management education (Baum, 2020). These reports were assessed in accordance with predefined criteria related to both technical accuracy and communicative effectiveness.

The final phase (Phase 4) involved the public presentation of each project in an open session. This concluding stage was designed to reinforce the experiential learning process by fostering peer-to-peer knowledge exchange and encouraging the dissemination of key findings and effective practices. This closing activity did not only facilitate reflective feedback but also contributed to reinforcing students' connection with the industry, in line with the principles of the experiential learning framework (Kolb & Kolb, 2009).

## 2.2 Project 2: “MyGuESHT - Mystery Guests Real Insights: Application of Mystery Guest Technique in a Creative Tourism Itinerary”

The project (MyGuESHT) was developed with a group of 3rd year Tourist Activities Management undergraduates within the scope of a Tourism Quality Management course at the School of Hospitality and Tourism (Polytechnic of Porto, Portugal). The course aims to enable students to further their knowledge of Quality Management, including key issues such as the application of diverse evaluation tools, including the mystery guest methodology. By challenging students to design and apply the mystery guest approach, the project provided them with an opportunity to develop core competences, such as critical thinking, creativity and collaboration, which are increasingly valued by employers. The project took place in the second semester of the academic year 2024-2025, between March and April, and followed a four-phase sequence, the details of which are outlined in the ensuing lines.

### 2.2.1 Phase 1 – Design and Planning

In this phase, the pedagogical team involved in the project held a series of preparatory meetings to define the project's objectives, prepare all the support materials to be provided to the students (mostly bibliography on the mystery guest methodology, and discussions on the project's assessment methods and its weight in the overall assessment of the course). As the project aimed to provide the students with an authentic real-world scenario, discussions were also carried out to identify the case to be explored through the project. Given the ongoing collaboration between the research team and the Porto Tourism Council (PTC), the project “Curated Porto: Creative Itineraries” was selected. The Curated Porto Itinerary integrates 13 locations (artistic studios and ateliers) which are open to tourist visits, promoting an immersive tourist experience, by giving visitors the opportunity to engage with the artists, take part in workshops and go on detailed visits to the venues. As a recent initiative of the PTC, the itinerary and the experience curated by the artists had not previously been assessed, making it a suitable case for the objectives of the MyGuESHT project.

### 2.2.2 Phase 2 – Kick-off

In the first class of the semester, the challenge was presented to the students, who had the opportunity to share their preliminary insights about the methodology and clarify some questions raised after the initial

discussion. Five working groups were voluntarily formed by the students (23) who quickly organised themselves and chose the venues (each group would have to visit at least 2 of the 13 included in the itinerary).

### 2.2.3 Phase 3 – Operations

In the operational phase students performed several tasks, following the mystery shopper research process proposed by Liu et al. (2014) and Turner (2012). In the planning and design phase, the groups created (collaboratively and in a classroom setting) a checklist which can be framed by three main stages of a tourist experience: the pre-visit, the visit, and the post-visit stage. The checklist is a pivotal instrument for the mystery guest methodology's application, as the overall results depend on the accuracy of the evaluation criteria/questions, which should be defined in accordance with the service delivery process and the potential failure points (Hesselink et al., 2004). In this case, the checklist included a total of 40 criteria, 25 of which were measured using a 5-point likert scale. The remaining 15 were yes/no questions, as the main aim was to assess the existence or non-existence of certain facilities and/or conditions. Just as an example, the criteria considered covered different topics such as the welcoming reception by the artists, hospitality, the organisation of the experience, the clarity of the communication, and the overall impact of the activity on the experience provided by the artist/ venue.

At this stage, the groups also developed a buyer persona which they considered to represent the profile of visitors looking for this type of experience/activity.

All the scheduling of visits was also carried out at this stage, as well as the development of an online form to record the observations made by each student on each visit. Adapting the checklist to a digital collaborative form (using Google Forms), accessible to all students, was deemed to be the most effective approach for ensuring data collection and facilitating subsequent analysis.

Most of these tasks were carried out in the classroom, thus ensuring follow-up and feedback from the teaching team, who also observed the performance of the groups and the main needs/ difficulties identified. Regarding the visits, they were carried out independently, as was the recording and analysis of the data.

Finally, in the post-visit phase, and in addition to the analysis carried out by each group, a debate and sharing session was organised in which all the students were able to report their impressions of the results obtained.

### 2.2.4 Phase 4 – Wrap-up

Finally, a wrap-up session was held at the end of the semester, where both students and teaching staff presented their perceptions on the methodology and its suitability for the project's objectives.

## 3. Key Takeaways and Final Remarks

Even though the mystery shopper methodology is well-established within the tourism and hospitality sectors, its application in pedagogical contexts – particularly in the context of student training – remains underexplored. This gap is particularly relevant given the increasing demand for graduates capable of translating academic knowledge into practical, workplace-relevant skills. As a result, the development of applied educational projects that foster observation and critical thinking is not only innovative but also highly relevant.

While the literature documents numerous interdisciplinary projects within the field of tourism and hospitality education, the projects described stand out for their innovative nature, namely, by integrating service training with empirical research, actively involving students in the research process and fostering close engagement with industry stakeholders, allowing students to monitor real-world service delivery processes and suggest evidence-based improvements.

The implementation of mystery shopper methodology with Hotel and Restaurant and Catering management students yielded several notable outcomes. Overall, there was a high level of student engagement and adherence to the project structure, with most groups demonstrating strong commitment to the defined objectives and evaluation framework. In the case of the Tourist Activities Management students, the also findings confirm the relevance and suitability of this methodology for assessing the quality of the tourist experience, and its potential for replication in other contexts. While the need for precise improvements to the checklist was recognized, the students exhibited a high level of commitment and motivation to carry out the project as the methodology implies a considerable amount of autonomy as well as creativity.

The immersive and practical nature of the activities appeared to enhance student motivation, as evidenced by their proactive involvement during the planning, execution, and reporting stages. It should be noted that time management emerged as both a challenge and a learning opportunity, as the project required students to coordinate schedules, conduct fieldwork efficiently, and meet academic deadlines, a process that fostered greater autonomy and accountability. Furthermore, the reflective component of the post-visit reports revealed a progressive development of critical thinking skills, particularly in the analysis of service quality and the articulation of constructive feedback. The combination of experiential learning and real-world application contributed to a deeper understanding of operational standards and customer experience dynamics.

## Ethics Declaration

This study did not involve sensitive personal data. As such, ethical approval was not required in accordance with the relevant institutional and national guidelines.

## AI Declaration

Artificial intelligence (AI) tools were used during the preparation of this manuscript for language editing purposes only. Specifically, tools such as ChatGPT and Jenni.ai were employed to improve clarity and format references. No AI-generated content was used in the formulation of research ideas, data analysis, or interpretation of results. All substantive intellectual contributions are the original work of the authors.

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