Guided tours and tourist attractions in the postpandemic world: thematic evolutions and spatial changes

Narcís Bassols i Gardella

Abstract

Purpose – The purpose of this paper is to widen the understanding of the shifts the tourism industry experienced as it went through the Covid-19 pandemic. To contribute to this question, an empirical comparison is made between the supply of guided tours and sights at an urban destination in the pre- and postpandemic eras, thus gauging the changes in the guiding tours industry after the pandemic.

Design/methodology/approach – By conducting a convenience data gathering and a double-level analysis (tours analysis and sights analysis) on the tours and attractions supply at an urban destination, underlying trends come to light, related to the changes in the postpandemic era. This empirical comparison (2019 vs 2022) allows the authors to assess what has and has not changed in the postpandemic context.

Findings – Guided tours and attractions supply are evolving in the researched destination, but at a slow pace. Therefore, we conclude that long-term processes in destinations prevail over short-term disruptions, no matter how strong these disturbances are.

Practical implications – The results are of interest to practitioners as they facilitate a better assessment of the impacts of a crisis and greater awareness of the evolution of attractions in urban tourism. While the “staple tours” in a destination are always there, practitioners should keep an eye on new spaces in the city which the sector is opening up and also new touring trends.

Originality/value – This study is one of the few to empirically compare a pre- and postpandemic situation, as far as city-guided tours are concerned. It helps practitioners and authorities in urban destinations to assess the new trends that have emerged in the postpandemic era, and offers a two-level tool for tour analysis that could be applied to any urban destination.

Keywords Guided tours, Tourist attractions, Covid-19, Destination management, Destination evolution, Cartagena, Colombia

Paper type Research paper

1. Introduction and research question

As the tourist industry has gone through the Covid-19 pandemic, practitioners and researchers are discussing to what extent it has shifted. In looking for opportunities to contribute to the debate, this paper researches the impacts of Covid-19 in the guided tours sector in an urban context.

Some authors stated that urban guided tours are a reliable proxy of shifts and evolutions in destinations (Paulino, Domènech, & Bassols, 2022). Furthermore, the guided tours sector was proven highly vulnerable during the pandemic (see Subsection 2.1), with virtuality emerging as a strong alternative. Generally speaking, much less research has been devoted to the guided tours compared to other sectors (Zhao & Timothy, 2017), such as the hotel industry, so there is a need for further research in this subsector.
At the beginning of Covid-19, most pandemic-related research was mainly descriptive or prescriptive (Sigala, 2020), and this trend persisted throughout the pandemic (Huang & Wang, 2022), highlighting the need for sound research in the current postpandemic era; hence, an empirical approach for this paper was chosen. In fact, it was discovered that only very recently, works have emerged empirically comparing the state of the pre-pandemic times with the current moment of “tourism restart.” Indeed, comparing data from said periods may help the research community to assess whether tourism has evolved into more sustainable forms. This is a promising research line to which this article aims to contribute.

The need to deeply understand the impacts of the pandemic brings us to the recent theories explaining shifts in the destinations, such as Richards (2018) as well as Sanz-Ibáñez & Anton Clavé (2015). The former posits an evolution of attractions in destinations, from basic assets to more complex ones. The latter argue within the economical evolutionary geography framework that, in their evolution, destinations tend to “upgrade” themselves looking for more added value. As our contribution toward theory, both frameworks are to be assessed with our field work based on the supply of the tours and sights at an urban destination.

The field work focuses on the tours and sights the guided tour companies offer in the city of Cartagena, Colombia, by comparing the 2019 supply of tours and sights with the one in 2022. Two central aspects are studied particularly here: the thematic and spatial changes. Are the 2022 tours strongly connected to the 2019 tours in spatial and content terms? Or do the new tours display new patterns and topics, and if so, what are they? And how are these continuities and shifts explained? Therefore, we phrase our research question (RQ) as follows:

\[ RQ \text{. How has the supply of attractions and guided tours in cities shifted over the pandemic era, and what are the consequences of these shifts in spatial and thematic terms?} \]

Thus, the central contributions of this paper are a deeper understanding of the impact of Covid-19 on urban tourist places, as well as into the potential development of new spatialities and themes in urban tours.

2. Literature review and conceptualization

This section reviews the literature regarding the impact of Covid-19 on the tours industry, and then conceptualizes the “de-centering” of tours to understand the spatial notions in this research.

2.1 Guided tours in the aftermath of Covid-19

Although the guided tours sector has received less attention than other components of the tourist system (Zhao & Timothy, 2017), it has long been acknowledged as an essential element in destinations (Canani, 1999). Traditionally, it has been seen as a crucial factor in connecting visitors to the destination’s attractions and introducing them to the local culture (Pu, Cheng, Samarathunga, & Wall, 2022), which eventually influences their behavior toward sustainability (Bachmann-Vargas, Van Koppen, & Lamers, 2022; Pereira & Mykletun, 2012; Sangpikul, 2020). Guiding is also seen as a proxy on how well organized a destination is (Hu & Wall, 2013; Rutledge, 2022; Zhao & Timothy, 2017) and plays an important role in visitor satisfaction and loyalty (Gali & Aulet, 2019). As guiding provides a richer experience of the place, it may be the “door opener” or the “gateway” to the destination, as it has been shown that a destination’s experience differs when intermediated by guides (Weng et al., 2020). Sometimes, though, guides may be seen as “gatekeepers” standing between the visitors and the place (Zerva & Nijkamp, 2016). In recent years, tours
have been regarded as a “cocreating” possibility (Weiler & Black, 2015; Buzova, Sanz-Blas, & Cervera-Taulet, 2022) as locals become part of the guiding process.

Two main aspects have come to the fore in the guided tours sector during the pandemic. The first one is the increased “virtuality,” with different kinds of online or virtual tour environments emerging. Lu et al. (2022) underscored the opportunities of this tourism modality, especially as a marketing tool. They specifically stated that virtual tourism has the potential “to aid the recovery of the tourism industry” (p. 442). There is a certain consensus over virtual tours as marketing tools, as stated by El-Said & Aziz (2022) while studying push factors for virtual tourism. On the contrary, some authors see a form of solidarity and equity in this trend toward virtual tourism (Nauttiyal & Polus, 2022).

The other aspect that has come to the fore is the social one. Nazli (2022) was among the first to analyze the consequences of the pandemic on guides, based on an international sample. The solutions he proposed were along the lines of collaboration among professionals and the destination stakeholders at large. Ren & Wong (2021) wrote that the guided tours sector has been “one of the most impacted groups in the industry,” and set out to find the “mitigating factors” that were determining for Macao’s guides during the pandemic. Both these papers show similar conclusions and recommendations. Galí (2022) also sees the “fragility of the profession” with a large number of her Catalan guides sample as passive; however, she also uncovers a group of innovative and resilient professionals among her respondents. Galí’s findings are echoed, to a significant extent, by Carvalho (2020) for the case of Portugal.

So, according to the above, research has been produced on the social aspects of the tours industry and the virtuality, but no research has considered the supply of tours and sights to see the changes from the pre-pandemic era to the current situation.

2.2 Conceptualizing “spatial de-centering” in destinations

An important feature of tourism is its trend toward centering: places designated as “central” or “enclaves” strongly determine the location of modern-day tourism attractions and activities in many destinations, especially in urban destinations. This was noticed half a century ago by Stansfield & Rickert (1970) as they put forth the concept of “Recreation Business Districts,” an idea further developed by Burtenshaw, Bateman & Ashworth (1991) and, specifically for heritage cities, by Getz (1993) – hence the talk about “resorts” and “tourist areas” that started back in the 1980s. A logical consequence of “centering” is that only selected portions of a place (or even highly localized sites) are activated for tourist uses (Judd & Fainstein, 1999; Saarinen, 2017). In developed countries, the “nicely set” tourist areas are the ones most prone to overtourism (Milano, Novelli & Cheer, 2019), especially so in heritage cities. As these areas become thematized, residents avoid them, leaving visitors just interacting among themselves. In emerging countries, investing in a shiny urban tourist area often means neglecting investment in public infrastructures in the other neighborhoods, thus producing a dual city: the “nice one” (for tourists) and the “ugly one” (for most residents). In Cartagena de Indias, Colombia, our study case, a public discourse came up some years ago legitimizing these “Two Cartagenas.” “Centering” seems, therefore, an inherent trend to many tourism developments. So, we define “spatial de-centering” in a destination as an even distribution of the share of benefits of tourism (and also the share of burdens) toward all spaces in a destination and their residents.

Spatial de-centering is a growing trend in city tourism: in recent years, “off the beaten track” areas or sights have been increasingly sought after in urban settings by certain groups of tourists, questioning more static spatial divisions (Quaglieri & Russo, 2010). Examples of this are the growing interest in urban liminal spaces (Muldoon, 2020) or in urban and peri-urban green spaces (Johnansson & Nilsson, 2022). Maitland (2019) studied this issue in London, stating that, though suffering from a negative image, the city’s suburbs are the
stage of authentic everyday life. A possible research line here is understanding how much centering and de-centering trends are in a destination, and how do they coexist.

Pushing for “de-centering” means thus expanding the range of tourist activities out of the enclave zones in the city to reach most parts of the destination and its residents, which takes pressure away from the tourist areas and helps to distribute visitors and economic benefits (as well as social and environmental burdens) more evenly across the place. This paper examines the matter of “spatial de-centering” in terms of concentration versus dispersion of the sights and the guided routes in the destination Cartagena, Colombia. However, as Mansilla & Milano (2022) pointed out when studying the de-centering of Barcelona’s tourism toward some neighborhoods in recent years, this may become a predatory practice if not controlled, as it may reproduce the same problems seen in tourist enclaves. This happens when tourism development is only about “enlarging” the central tourist area, so equaling de-centering to more sustainable practices is not a straightforward matter, as this should be considered on a case-specific basis. In the particular case of the destination Cartagena, we consider that, at this moment, a certain level of de-centering is beneficial as it might balance the destination as a whole.

3. Research context

The chosen field work for this research is the city of Cartagena de Indias, on the Caribbean coast of Colombia. It is considered to be the most important holiday destination in the country and also a “multifaceted” one as it possesses different attraction typologies (built heritage, beaches, nature and intangibles related to the local culture). A multispatial city and multifaceted destination such as this one is especially interesting for our research purposes, as eventually new attractions may emerge and others may be left in the background because of different dynamics, so these are worth monitoring. For more contextual information about Cartagena de Indias’ tourism development, see Piñeros (2018) and Bassols (2019).

A first overview of the supply of guided tours in the city is provided by the official tourism statistics portal “Por tu Colombia” (www.portucolombia.mincit.gov.co). This portal reveals that guiding was a growing sector year by year in Cartagena before the pandemic in terms of numbers of agencies. These numbers shortly diminished in 2020, but since 2021, they have bounced back and, in fact, it is a strongly growing sector, even outperforming the growth of other tourist sectors in the city: it has gone from 240 enterprises in 2019 to an astonishing 403 mark in 2022.

A report worth mentioning about Cartagena’s guided tours industry is FONTUR [Colombian Vice-Ministry of Tourism] (2015). This report makes some recommendations in operational terms for improving the destination’s guided tours, such as the need for more training and controls and more efficiency in the task of guiding. Crucially, it points to the need of more segmented, specialized and experiential tours. As the report is from 2015, it serves as a good basis to see whether the city’s tours have evolved in the suggested directions, which we will determine in this research.

As for the post-Covid-19 situation in the destination, it is been “back to regular business” long ago, much earlier than in Europe. So, the pandemic is perceived to be past and over, with some stakeholders openly taking a boosterism approach in the current postpandemic era. For example, statements by the director of the Cruisers’ Terminal suggest the need to increase the number of visitors without taking much into account their impact (Mundo noticias, 2022).

4. Methods and data gathering

As stated and justified further above, our methodology empirically compared the supplied tours and sights in two different periods, in spatial and thematic terms. The data for the
pre-Covid-19 period were collected in December 2019 and the data for the post-Covid era were gathered in July 2022, in both instances via a nonprobabilistic sampling. Thus, we compared two different temporary marks with two levels within each of these (tours and sights). To put it in Wall’s (1997) terminology, we compared two sets of “lines” (guided tours) against each other and we did the same with the “points” (supplied sights). In both instances, the same steps were followed to get two comparable data sets: finding the companies, collecting and standardizing their tour data and comparing these data. In the process, the following caveats and procedural questions are important:

4.1 Finding the guided tour companies in Cartagena

This was done via the publicly available database RNT (National Tourism Register) from the Colombian Government. Using official data meant we were definitely considering only legally operating companies. For 2019, we found 240 enterprises in the “Guides and Tours” section of the RNT for Cartagena. For 2022, we found a set of 403 enterprises.

In a first selection, we discarded wrong entries (geographical mis-locations, not local enterprises, enterprises no longer operating according to the RNT and companies not offering tours or with their online outlets shut down). Further selection discarded those companies not offering enough information about their city tours, or offering only excursions to nearby or distant beaches, islands and nature sites. The companies admitted in both data sets of 2019 and 2022 had to be local companies producing or reselling city tours – multisite enterprises were also accepted as long as they ran an office in Cartagena. However, companies reselling products from other parts of Colombia or abroad were not entered into the database, otherwise the search work would have expanded too much and the “local” point of view would have been lost. It is important to underscore that both tour producers and resellers were entered into the database so as to account for the most exact number of times a guided route or a sight are offered.

This finally amounted to 64 enterprises admitted to the data set of 2019 and 93 companies in 2022.

4.2 Collecting and standardizing the supplied routes and sights

This was done via internet-scraping, mostly from the companies’ websites, though in some instances from the company’s Facebook pages when a company had no website of their own. The collecting process was quite tedious, as it had to be done manually on an Excel spreadsheet. Furthermore, some enterprises would give ambiguous information or not inform enough about their products, so some assumptions had to be made by the researcher. In some instances, the names had to be standardized as some tours would name the attraction in different ways (e.g.: San Felipe’s Castle vs. San Felipe’s Fortress).

This means that, in some occurrences, the author had to make his best guess in an effort to group the tours, so as to understand how many unique tours were offered by a company, and how many times a tour is resold. It was a hard, cumbersome work to effectively understand whether two (highly) similar tours being sold by two different companies were actually two different products or were the same product being resold by these companies. It cannot be excluded that some errors may have slipped into the tours’ database in the process.

Only tours that were clearly informed and implied mobility were considered; therefore, “experiential” standalone products like cooking, painting or dancing were not entered into the database as these do not imply any mobility from one place to another and their focus is not the city sights. Neither were sports activities. “Gourmet tours” or “bar roaming” tours were counted as long as it was informed which points the tour touched on. Furthermore, we abstracted from the time factor if informed (i.e. for how long a point would be visited or the
total duration of a tour), as the most crucial data to the present experiment was to understand the number of unique routes and sights supplied, and the times each one is of them is supplied.

Having completed all this, for 2019 we came to a total of \( n = 244 \) offered tours, out of which \( n = 82 \) were unique tours. For 2022, we found \( n = 356 \) tours, out of which \( n = 123 \) were unique tours. As for the sights, in 2019 there were \( n = 88 \) unique sights supplied at least once, in 2022 this figure had fallen to \( n = 77 \).

The tours (and all the sights within a tour) were extracted and tagged in terms of theme and space. A “centered” tour in this context is one taking place in the most “usual” and tourist places in the city, such as the historic center or the most salient monuments outside it. By the same token, a “shifted” tour is one that includes sights other than the historic monuments, which have been consistently consumed as main sights in Cartagena for the past decades.

5. Results

5.1 Tours’ general figures comparison

The overall numerical comparison of tours in 2019 vs 2022 shows a considerable increase in their supply, both in the numbers of the overall supplied tours (+46%) as well as in the unique tours (+50%). In principle, both figures are consistent with the increase in numbers of the guiding enterprises (+68%). Comparing the number of companies admitted to the database with the total supplied tours, we see that, both in 2019 and 2022, any given company would offer on average 3.8 tours, so the general capacities have remained unchanged in the postpandemic era.

With the figures of supplied tours versus unique tours of any given year, we see a “magnification factor” of tours and sights, i.e. the multiplying factor between a unique tour (or sight) supplied and the number of times this tour (or sight) is supplied via reselling. For the supplied tours in Cartagena in 2019, this factor averages \( x = 2.98 \) and for the tours in 2022 this factor is \( x = 2.89 \). Again, this value has remained practically unchanged in the postpandemic era, so there are as many produced and resold tours before and after Covid-19.

5.2 Tour thematic focus

When comparing the contents of the tours from 2019 to the ones from 2022, it is noticeable that the tours related to build heritage have lost their pulling power to a significant extent: out of the 149 most supplied tours in 2019 (Table 1), 102 tours were related to the city’s history, monuments and built heritage. This figure decreases to 62 out of the 194 most supplied tours in 2022.

<table>
<thead>
<tr>
<th>Tour name</th>
<th>Most supplied tours 2019</th>
<th>Times supplied</th>
<th>Tour name</th>
<th>Most supplied tours 2022</th>
<th>Times supplied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Day city tour on “Chiva” [typical local open bus]</td>
<td>39</td>
<td>Bay excursions (different types of boats and times)</td>
<td>59</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Night party tour on “Chiva”</td>
<td>37</td>
<td>Night party tour on “Chiva”</td>
<td>47</td>
<td></td>
<td></td>
</tr>
<tr>
<td>City center walking tours</td>
<td>29</td>
<td>Day city tour on “Chiva”</td>
<td>35</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Horse-drawn carriage tours</td>
<td>11</td>
<td>Mangrove tours</td>
<td>16</td>
<td></td>
<td></td>
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<tr>
<td>Segway tours</td>
<td>10</td>
<td>Walking graffiti</td>
<td>11</td>
<td></td>
<td></td>
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<tr>
<td>Double-deck bus hop on/hop off</td>
<td>8</td>
<td>Double-deck bus hop on/hop off</td>
<td>10</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kayak/paddling tours</td>
<td>5</td>
<td>Segway tours</td>
<td>9</td>
<td></td>
<td></td>
</tr>
<tr>
<td>City tour with trolley</td>
<td>5</td>
<td>Horse-drawn carriage tours</td>
<td>8</td>
<td></td>
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<tr>
<td>Sunset excursion on the Bay on Catamaran</td>
<td>5</td>
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</table>

Source: Created by author
Although in 2019, there was already an offer of natural tours (many of them to nearby islands), these are on the rise in 2022. In fact, there is a growing amount of companies only bringing tourists to areas outside the city and completely forgetting the city’s tourist area and its cultural assets. Nautical tourism, which includes boat or catamaran tours in the Bay, as well as mangrove tours (done on boats), is also on the rise, perhaps as a result of public bodies’ promotion of nautical tourism in recent years.

Niche and segmented tours have slightly augmented. There are several new photo tours, graffiti tours or culinary tours. There are also a couple of segmented new tours for families with children or for handicapped people in 2022. Some tours related to the local culture are novelties in 2022: a tour devoted to the local writer, Nobel laurate García Márquez, a “Slave Tour.” Some of these new tours use theatricalization techniques or sell themselves as bringing tourists in contact with locals to experience “authentic” Cartagena.

Moreover, there were some 60 tours supplied only once or twice in 2019 as well as around 90 tours supplied once or twice in 2022, thus clearly showing a growing “long tail” in the tours supply (see also Subsection 5.5 further below). The most innovative tours are included in this “long tail”: treasure search tour, museums’ tour and the ones mentioned in the above paragraph.

5.3 Tours’ spatial de-centering

There has been some de-centering of the tours in the two compared periods. As mentioned in the previous section, in 2022, the “sea-side” of the destination (previously consumed only by upscale visitors in expensive boats) has become hugely popular. The new tours make it easy for everyone arriving in Cartagena to literally “embark” on a sea tour in the Bay or in the mangroves. There is also an increase in long-range excursions to close or distant islands or to other destinations alongside Colombia’s Caribbean coastline. In the particular case of Cartagena, there has always been a number of companies devoted only to island tours in the nearby natural park Islas del Rosario. Thus, in 2022, there were 43 tour enterprises just offering islands and nature tours and not considering any city tours in their operations (against 93 that include at least one city tour in their offer). Furthermore, though very niche in numbers, some tours in the city bring visitors to “off the beaten track” urban locations such as the neighborhoods of Getsemani and San Diego or to the local market in Bazurto.

Finally, it is significant to notice that the timeframe for the tours has been enlarged and diversified, with a growing number offered at night time, so the night has also become a possible operations time for the guiding enterprises.

5.4 Mobility in the tours

Table 3 shows that “chivas” are the absolute mobility winners, being the preferred vehicle in the two studied periods. However, compared to 2019, in 2022 the sea-related tours experience an extraordinary growth (10 vs 59). Some other tours like carriage tours or the double-deck bus maintain their supply at approximately the same levels. The loss of the trolley tours in 2019 is more than compensated by the Segway in 2022.

Leaving aside the “chiva” (which, as a typical means of transportation, is surprising to visitors and a “must” in the city, and therefore well-supplied) and the strongly emerging maritime transportation, most tourists move around in the city mainly by walking plus using a support vehicle, both in 2019 and 2022. When considering all the supplied tours, we find that the most common land tour will bring visitors in buses (or vans, or upscale cars with driver) to the outer monuments in the city and complement this with a walk in the historic center (where no cars or buses are allowed), perhaps with an opportunity for shopping at the end. This mobility and route are quite the standard in both eras (19 tours in 2019 and 41 tours in 2022). As the historic center is pedestrians-only, there is a growing offer of only-walking tours there, sometimes including adjacent areas (25 tours in 2019 and 40 tours in 2022).
As for multimodal tours, there is the same proportion in multimodality for both eras. As for the choice of vehicles, this increases from 12 in 2019 to 16 in 2022, with some exotic additions such as an upscale “chiva” and electrical rollers or scooters.

5.5 Sights’ figures and thematic comparison

In 2019, 88 unique sights were supplied, in 2022 this figure went down to 77 (Table 1). In both instances, a low number of sights were in high supply, whereas the majority of the sights in the destination had a comparatively low supply. Again, as with tours, this gives rise to a “long tail.” This statistical effect is defined by Lew (2008, p. 409) as “the far ends of a normal statistical distribution. In a normal bell curve, the highest frequency occurrences appear at the center of the distribution and then gradually taper off at the high and low extremes.” Figure 1 compares the sights offered in 2019 and 2022 and shows the ensuing “long tails.”

In both instances, similar “long tails” are formed when pitching the supplied attractions’ list (x-axis) to the times each of these is supplied (y-axis), overlapping on several instances. However, the 2022 tail is taller and shorter, which means there is a concentration of the sights, i.e. less sights, supplied more times each. Table 2 below shows the most supplied sights for 2019 and 2022 and their typologies.

Notice the large amount of colonial architecture on offer on both rankings, as they take up

![Figure 1](image-url)
two thirds of each column. Some less space is given to 19th or 20th century modern monumentality. Seaside and beaches are given a very low interest. The souvenir shop area of Bóvedas Plaza remains clearly present in the supply for both eras. The top two pull attractions are the same for both years, they even have been supplied more in 2022, and 10 out of 12 sights are on both rankings, with more or less the same values, except for Bolívar Park. While thematically very similar, the 2022 data shows a bit more de-centering than the 2019 data: if we consider the total times the sights in the historic center are supplied versus the times attractions outside it are supplied, we get 123 times (2019) versus 139 times (2022), an increasing of 13% in de-centering.

Finally, in Table 3, the “end of the tail” is studied. We offer a typological classification for all the sights we found offered once or twice in the tours, i.e. the least supplied sights.

While “historical built heritage” is still a dominant theme here, other typologies emerge, such as nature and beaches, as well as intangible heritage, the latter growing in supply in 2022 to the detriment of the former.

6. Discussion

6.1 Unchanged business capacities by a growing number of companies

A first point to discuss touches on Covid-19 and its impact on enterprises: The numbers of enterprises, overall supplied tours and unique tours have experienced an enormous growth in less than three years – and, surprisingly, this has taken place amid the Covid-19 pandemic. While in Cartagena, the number of guided tours businesses went slightly back in 2020, in the subsequent two years it grew hugely, as if there had been a pent-up supply. If post-Covid-19 equals restarting growth in numbers, we can say that the pandemic was over in the destination by mid-2021, an early rebound. A closer look at the companies’ database reveals that most of the large or well-established guiding tour companies in 2019 are still there in 2022, with relatively similar offers, so the changes in the landscape are due to new entrants. The most noticeable move to report is the arrival at the destination of nautical enterprises specialized in all types of sea experiences, which have provided broad segments with something that until recently was reserved for bigger budgets: experience the city from the sea. This growth in numbers of enterprises poses a challenge to most research about Covid-19, as it usually points to a decrease in the number of enterprises, and a particularly sharp one in certain destinations.

In terms of production capacity, the postpandemic seems to have left the companies’ capacities unaltered, as on average, each company offered 3.8 tours before and after the pandemic. The relation among the uniquely produced tours vs the resold tours (what we have called the “magnification factor”) remains almost unchanged: 2.98 vs 2.89. Therefore, we confidently say that the capacities in the sector remained unchanged in the studied period. This is a clear assessment that contradicts some results by other researchers who see diminishing capacities in many destinations.

<table>
<thead>
<tr>
<th>Table 3</th>
<th>The less supplied sights in 2019 and 2022 and their typologies</th>
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</thead>
<tbody>
<tr>
<td><strong>Typologies of the less supplied sights</strong></td>
<td><strong>2019</strong></td>
</tr>
<tr>
<td>Historical built heritage</td>
<td>13</td>
</tr>
<tr>
<td>Nature and beaches</td>
<td>10</td>
</tr>
<tr>
<td>19th and 20th century sights</td>
<td>8</td>
</tr>
<tr>
<td>Intangible heritage</td>
<td>2</td>
</tr>
<tr>
<td>Shopping</td>
<td>2</td>
</tr>
</tbody>
</table>

Source: Created by author
The study of mobility trends reveals mixed shifts and evolutions: new types of vehicles are supplied with a number of tours offering combined transportation. However, there is room for growth in multimodality in the destination, particularly in the land–sea mobility. Maritime destinations with built heritage like Cartagena deserve being seen from land and from sea. While multimodality is sometimes difficult to set up because different transport companies have to cooperate, this would be an interesting added value for the destination—this is a business tip for the practitioners.

6.2 From supplying “lines” to supplying “areas,” the slow thematic progress and the centering trends

As for the tours’ themes, it is noticeable that the tangible culture, especially embodied in the architecture of the historic city center and the fortresses and walls, has lost much of its appeal (Table 1). However, it still retains its interest if we look at the level of the supplied sights (Table 2), so the historic center maintains a “pull effect.” Figure 1 also reveals a trend toward a numerical concentration of the sights across the whole supply market. All these effects are mainly due to the massive deployment of a new offer in the destination: the maritime tours. As these do not specify points in their offer (or very few), their massive presence in the 2022 data has some remarkable side effects, such as there being less sights on offer in 2022 by a huge increase in the overall number of tours. This is a biasing but interesting effect: having a good share of maritime tours and more experiential tours in the destination offering the market “areas” rather than “lines” [also in the terminology introduced by Wall (1997)]. This supply shift is also communicated accordingly by the companies, which in 2022 no longer promote tours as a group of points to be visited but rather as areas or experiences to be lived, compared to 2019 where many tour points would be listed exactly. This all reinforces the supply of “areas” as opposed to the supply of “lines,” and it is an interesting trend to watch in the future because the marketing of areas is quite different from the marketing of lines or points.

Another related issue is whether the destination has become more experiential, as recommended by the report FONTUR [Colombian Vice-Ministry of Tourism] (2015). And here we must say that progress has been slow. The repetitive “staple tours” connecting the “famous” sights in the city have even grown in 2022 (see Subsection 5.4). This comes at the detriment of the supply of other types of more innovative tours, such as the ones in Table 3. Save for maritime tours, the other new themes in the tours and sights are low in numbers, emerging only slowly as mainstream. This is a slow trend that has been observed for some years in Cartagena and confirms previous findings about the difficulties in shifting or changing a destination’s main attractions (Bassols & Leicht, 2021). This slow evolution has long been known to exist from the consumption side, and our study extends this to the supply side. Paulino et al. (2022) noticed repetition patterns in tourist behavior in the city, due to partial coupling of supply and demand; with our research we can clearly ascertain that this behavior is promoted, among other things, by a certain type of “centered” supply which is sustained over time.

A concurrent phenomenon is to notice here: The low numbers in supplied sights (less than 100, both in 2019 and 2022) compared to the total number of officially designated sights in the destination (over 300, see FONTUR [Colombian Vice-Ministry of Tourism], 2013). Many studies remark on this effect from the consumption side, and we reveal it from the supply side: Following a worldwide trend (Donaire & Galiano, 2011), in Cartagena, there is a limited supply and consumption of sights, which promotes spatial centering (Saarinen, 2017) and this, at the level of sights, has not been changed by Covid-19.

6.3 The trends toward spatial de-centering

Opposite to the aforementioned trends toward centering, we also must notice other tendencies toward spatial de-centering in the tours, which have increased during the
pandemic years. This de-centering actually takes place in two directions: inwards to “off the beaten track” areas in the tourist zone (such as the neighborhood of San Diego within Cartagena’s historic city center or the city’s Bay thanks to the new boat tours) and outwards toward other landscapes far away such as coral islands or archipelagos. This is a double process of “inward-pushing” and “outward-pushing.” At the level of sights, de-centering is up to 13%.

Spatial de-centering necessarily means discovering and promoting new attractions to supply, to the detriment of the attractions located in the central areas, so in the mid-term, the shifts in Table 1 should also be visible in Table 2. Furthermore, more research is needed to assess whether de-centering means more opportunities and equality in the destination or it is simply a “devouring” process (Mansilla & Milano, 2022).

Finally, the field work has also uncovered a trend toward “temporal de-centering,” i.e. supplying tours or activities outside “regular” times. There has always been a busy nightlife in Cartagena, which seems reinforced by these new night tours focusing on themes other than partying. The question is whether this is an opportunity for sustainability in the city or merely represents just another effect of predatory tourism, perhaps just as annoying to residents as often happens in any city’s nightlife [see most contributions to Smith & Eldridge (2021)]. Future research may also look into the relationship of temporal and spatial de-centering to ascertain how interrelated they are.

7. Conclusions, limitations and further research

7.1 Answering the research question and theoretical contributions

As a response to the RQ, we state that the pandemic represented a moderate push toward spatial de-centering in the researched city tours and so for the themes and topics of these tours, but that was by no means a land-sliding process: city tourism has evolved through Covid-19 slower than most predicted at the beginning of the pandemic.

Relating these findings to general frameworks in the Introduction, it must be stated that, while evolutionary geographies assert that destinations progress by looking for more added value (Sanz-Ibáñez & Anton Clavé, 2015), this a process running quite deep in the places’ dynamics. Apparently, the Covid-19 disturbance has only touched the “surface” of the researched urban destination, so it has not been a major “juncture” point after all. The evolution trend posited by Richards (2018) from basic to tangible to intangible attractions in destinations is also followed here, but at a very slow pace. This all confirms that, notwithstanding big disruptions such as Covid-19, the evolution of a tourist (urban) destination is a mid- to long-term process, in line with previous literature (Bassols & Leicht, 2021).

7.2 Practical implications

The supply of attractions in urban settings has also been found slightly shifted after the pandemic; however, trends persist such as the low numbers of the actually supplied sights or the repetitive patterns of many city tours. These trends (both in spatial and thematic terms) remain quite strong in the postpandemic era in city tourism. It will be a challenge to content with when managing tourist cities in the future (Saarinen, 2017; Donaire & Gall, 2021).

Even though this paper did not set out to propose any methodological tools, we think the developed analysis method and the proposed tools are interesting to urban tourism authorities and practitioners. The proposed double-level analysis helps in uncovering differences between lines/tours and points/sights (Wall, 1997) in city settings, revealing trends which would go unseen in a one-level analysis. Likewise, analyzing “long tails,” a practice long known in tourism, though mostly applied to consumption analysis (Lew, 2008;
Donaire & Galí (2011), points to interesting latent tendencies in a city tourist offer. Furthermore, the uncovered trend of communicating “areas” instead of “lines” in urban tourism must be closely followed in the future, as it has the potential to create new forms of marketing for the guided tours industry.

7.3 Limitations and further research

It is noticeable that this study is not correlational nor causal, so the link connecting both moments pre and post is not a strong one. We are also cautious when it comes to transfer this paper’s findings to natural guided tours, as our frameworks and field work were developed within an urban tourism mindset. While our results are fundamentally valid for urban destinations, more research and reflection are necessary to see how far these can be applied to guiding in natural settings.

Notice also that trends toward both centering and de-centering coexist in the urban setting we have studied, as revealed in the Section 6. Some unexpected growing dynamics might take place in harsh times, such is the case for nautical tourism in Cartagena, developed over the pandemic era, this latter finding challenging much of the conventional research about the pandemic. All these matters warrant further research.

Studying the supply side (as opposed to the much-more researched consumption side) in a tourist city has proved to be highly insightful. Particularly, the tensions arising from an undersupply of attractions favoring concentration versus other forces pushing for de-centering (both in spatial and thematic terms) create interesting place and industry dynamics which have been laid out and explained here.

References


About the author
Narcís Bassols i Gardella holds an MA in modern languages and philosophy (Goethe-University, Frankfurt, Germany), a BA in hospitality management (ESTHSI Barcelona) and PhD in tourism and geography (Univ. Rovira i Virgili, Tarragona). He has been a lecturer for five years at Colombian universities, first at the Univ. Autónoma del Caribe, on the Caribbean, then at the Univ. Externado de Colombia in Bogotá. He currently teaches sustainable development and tourism at Uppsala University. His research interests revolve around the sustainable management of tourist places, consumer behavior and city tourism. Narcís Bassols i Gardella can be contacted at: narcis.bassols@angstrom.uu.se

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