

CALI TOURISM OBSERVATORY – SITUR VALLE DEL CAUCA

REPORT 2025

Cali Tourism Observatory - Tourism Information System of Valle del Cauca
Situr Valle del Cauca – Cotelco Valle del Cauca

Research Group in Economics, Accounting,
Management and Development (GIECAD) – School of Tourism
Universidad Autónoma de Occidente

Government of Valle del Cauca
Valle del Cauca Department Tourism Secretariat

Authors:

María Andrea Dorado Castillo

Alejandra Otero Leyton

María Isabel Tamayo

Harold Humberto Rivas Cano

German Morales Zúñiga

Margot Cajigas Romero

Fanery Andrea Hoyos Giraldo

María Fernanda Díaz Moreno



Escuela de
Turismo



Content Summary

The 2024 Annual Tourism Report provides a comprehensive overview of the performance of the tourism sector in Santiago de Cali and the strengthening of the Regional Tourism Information System – SITUR Valle del Cauca. The report begins with an updated description of the destination, including its economic, cultural, and tourism context, as well as its positioning within the national and international landscape.

Subsequently, the document analyzes tourism performance in 2024 through key indicators such as visitor flows, hotel occupancy, and tourist expenditure, highlighting trends in demand, seasonality, and the destination's capacity for economic generation. These results are complemented by an analysis of residents' perceptions regarding the economic, social, and environmental impacts of tourism, as well as sustainability measurements conducted among tourism service providers and households.

The report also provides a detailed overview of the statistical operations carried out by the observatory, including inbound tourism, tourism supply, employment, sustainability, visitor flows, and expenditure. These measurements are aligned with the key areas of interest of the International Network of Sustainable Tourism Observatories (INSTO), covering 11 thematic areas related to seasonality, economic benefits, governance, local satisfaction, environmental management, accessibility, and climate action.

Additionally, the document describes the institutional status of the observatory, its governance model, technological advancements, modernization of information dashboards, and the strengthening of analytical capacities. Key achievements include the update of public data consultation platforms, the formulation of strategic projects for operational sustainability, international participation in INSTO, and the consolidation of the observatory as a technical infrastructure for decision-making.

The report also outlines strategic objectives for the upcoming period, aimed at deepening tourism analytics, integrating new data sources, strengthening academic collaboration through SiturLab, and advancing toward international standards of tourism intelligence.

Finally, the document presents general conclusions and strategic recommendations for the sustainable development of the destination, identifying challenges, opportunities, and lines of action to position Santiago de Cali as a more competitive, inclusive, and sustainable tourism destination.

Santiago de Cali

Destination Description

Santiago de Cali, the capital of the Valle del Cauca department, is a Colombian city of significant historical and cultural importance. Founded in 1536 by Sebastián de Belalcázar



and established as a municipality in 1863, Cali has evolved into a special district recognized for its diversity and richness. The city is internationally known as the world capital of salsa, and since 2024, its Cali Salsa Music and Dance Complex has been included in the National Representative List of Intangible Cultural Heritage by the Ministry of Cultures, Arts, and Knowledge, consolidating it as a key symbol of local identity. Cali continues to position itself as an emerging cultural destination in South America, with recognitions such as UNESCO Creative City status and distinctions from the World Travel Awards.

Economically, Cali plays a crucial role as Colombia's third-largest economic center, together with the Valle del Cauca region. Its strategic location facilitates national and international trade, particularly through the Buenaventura seaport. The city hosts important industrial and commercial sectors, with leading companies and modern infrastructure that enhance its regional competitiveness.

In terms of quality of life, Cali has experienced significant progress in education, healthcare, transportation, security, and environmental management. Public infrastructure projects such as the "21 Mega Projects" and the Integrated Mass Transit System (MIO) have contributed to urban and productive development. With a multicultural population of over 2 million inhabitants, Cali offers a unique combination of history, culture, economic dynamism, and natural landscapes.

During 2024, the city strengthened its international positioning by hosting the COP16 Biodiversity Conference, one of the most important global environmental events. This conference brought together delegations from nearly 200 countries and positioned Cali as a destination committed to sustainability, biodiversity, and environmental diplomacy. Hosting this event enhanced the city's image as a venue for large-scale international events, generating positive impacts on the tourism, hospitality, and service sectors, with high occupancy levels and a notable increase in international visitors.

Tourism Performance in Cali

According to SITUR Valle, during 2024 Santiago de Cali recorded a total of 2,816,349 visitors, consolidating its position as a highly relevant destination at the regional, national, and international levels. Of this total, 926,984 corresponded to internal visitors, meaning residents of the Valle del Cauca department, representing approximately 32.9% of the total. Meanwhile, 1,553,181 national visitors from other regions of Colombia accounted for 55.2%, and 336,184 international visitors represented approximately 11.9% of total arrivals.

When compared to 2023, when 2,957,702 visitors were recorded, there is a slight decrease of 4.8% in total visitors in 2024, equivalent to approximately 141,353 fewer visitors. However, segment-level performance reveals differentiated dynamics.

The number of internal visitors remained relatively stable, with a slight decrease compared to 2023 (929,564), confirming the continued importance of intradepartmental tourism as a key component of the destination's tourism market. In contrast, national tourism showed a more significant decline compared to 2023 (1,761,802), which may be associated with



changes in the national economic context, such as inflation moderation, stabilization of fuel prices, and reduced pressure on domestic travel costs compared to the previous year.

Conversely, international tourism showed significant growth, increasing from 266,337 foreign visitors in 2023 to 336,184 in 2024, representing an approximate 26.2% increase. This growth may be attributed to factors such as greater international visibility of the destination, Cali's positioning as a host city for high-impact events in 2024 — including COP16 — as well as a favorable exchange rate for international visitors and the continuation of incentives such as VAT exemption on accommodation services for foreign tourists.

Overall, although total visitor volume in 2024 experienced a slight contraction compared to 2023, the composition of the tourism market showed a greater share of international visitors, reflecting a progressive diversification of demand and a strengthening of Santiago de Cali's position in the global tourism landscape.

Role of the Observatory in 2024

Organization and Institutional Participation Process in Indicator Measurement

For the measurement of tourism sector indicators, the Cali Tourism Observatory – SITUR Valle (Regional Tourism Information System of Valle del Cauca) has consolidated a governance model based on the participation of public institutions, private entities, and representative business associations of the sector. It also maintains coordination with the Colombian Tourism Information Center (CITUR) of the Ministry of Commerce, Industry and Tourism, through the Vice Ministry of Tourism.

The process is technically led by the core SITUR Valle team, responsible for methodological coordination, data collection, processing, and analysis. The observatory receives institutional support and guidance from the Tourism Secretariat of the Valle del Cauca department, which, according to its framework and cooperation agreements, is the main beneficiary of the information generated for tourism public policy decision-making.

COTELCO Valle del Cauca, a private association representing and leading the hotel sector in the region, actively participates in the administration of the measurement system, the technical committee responsible for defining indicators, data collection methods, and analysis of results, as well as in the preparation of statistical bulletins published at www.siturvalle.com.

This process is carried out jointly with regional universities, whose research groups contribute academic analysis and technical validation. Participating institutions include Universidad Autónoma de Occidente, Universidad del Valle, Universidad Santiago de Cali, Universidad San Buenaventura, and Pontificia Universidad Javeriana Cali.

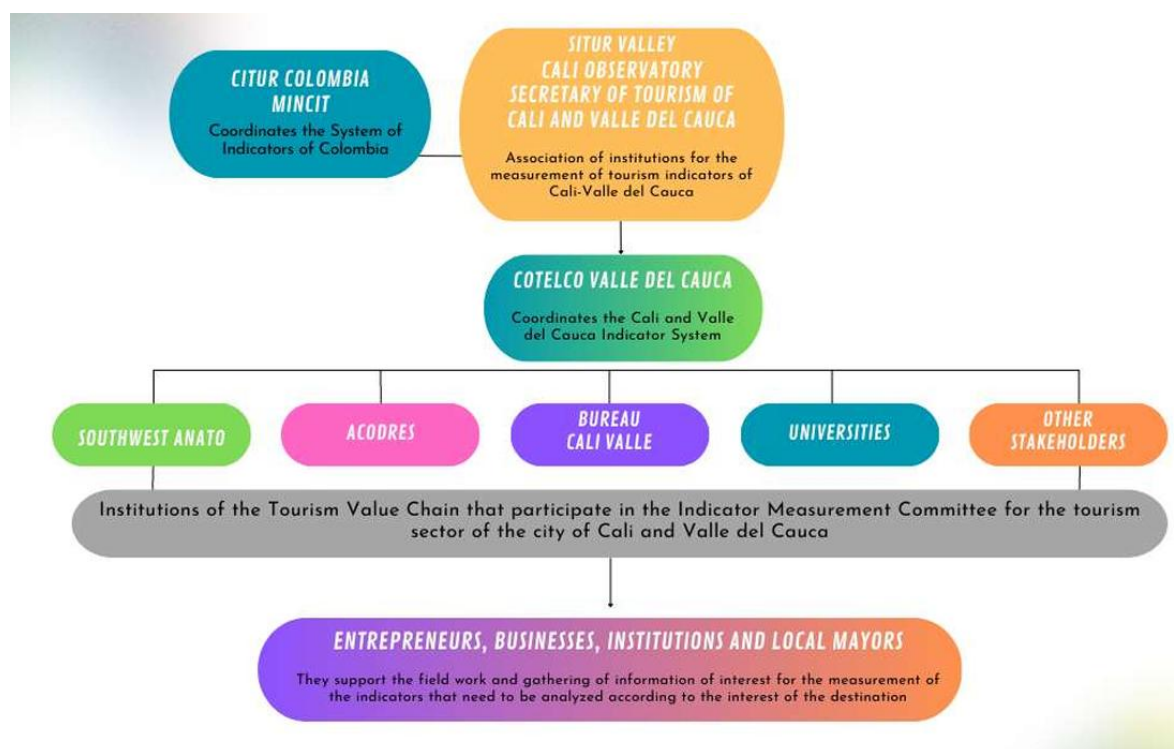
Additionally, other actors in the tourism value chain — such as ACODRES representing the restaurant sector, ANATO Suroccidente representing travel agencies, the Cali Valle Convention Bureau, PROCOLOMBIA Cali, municipal governments from the surrounding region, and other sector stakeholders — participate in the institutional committee for indicator measurement.



The observatory's governance and sustainability model is based on public-private collaboration and the continuous strengthening of technical capacities, enabling expanded measurement coverage and improved quality of regional tourism data. Each year, more institutions show interest in joining the system, recognizing the strategic value of the information generated.

According to the Methodological Document of the Santiago de Cali Tourism Observatory, the organizational structure enables technical leadership of the process, systematization, and effective use of collected data for generating knowledge applied to tourism sector development. The structure is flexible and adapts to the observatory's growth in scope, recognition, and institutional influence.

The observatory contributes to strengthening the tourism sector's capacities through knowledge generation, technical training, and applied research, promoting the competitiveness of the destination under principles of environmental, social, and economic sustainability.



For its operation, the observatory integrates support areas in administrative management, data analysis, research, and academic and social coordination.

The core operational team is composed of the SITUR Valle technical team, including technical leadership and professionals in economics, statistics, and tourism information management, who ensure the methodological and operational continuity of the system.



In 2024, the observatory's funding was supported by financial resources from the Government of Valle del Cauca, contributions from the regional tourism sector to ensure system continuity, and in-kind contributions through tourism promoters who support survey implementation and field data collection.

Status of SITUR Valle in 2024

During 2024, the Regional Tourism Information System of Valle del Cauca – SITUR Valle consolidated its technical operation by maintaining a permanent statistical measurement framework for regional tourism. Measurements are structured at two levels: monthly monitoring and annual strategic measurements.

At the monthly level, the system conducts continuous measurements of inbound tourism, characterization of the tourism supply and sector employment, as well as visitor flows and estimates of internal, national, and international tourist arrivals to the destination. These measurements provide timely information on tourism market behavior and its economic dynamics.

At the annual level, SITUR Valle conducts the census of tourism service providers, comprehensive tourism sustainability assessments, and special studies related to high-impact events. In 2024, statistical monitoring was carried out for key cultural and tourism events such as the Petronio Álvarez Pacific Music Festival, the Cali Fair, the World Salsa Festival, and the International Film Festival, which represent key milestones in the destination's tourism dynamics.

The organization is led by a director with a background in economics and a master's degree in tourism management, supported by a statistical analyst with a master's degree in data science and an economic analyst. The data collection team consists of four general surveyors and an approximate network of 100 tourism promoters who support field data collection through institutional partnerships.

Through collaboration with regional universities, SITUR Valle also benefits from associated academic analysts with doctoral-level training in tourism, economics, sustainable development, culture, and heritage, who contribute to strengthening the system's methodological and scientific framework.

SITUR Valle del Cauca is managed by the Hotel and Tourism Association of Valle del Cauca, and its sustainability is ensured through funding from the Government of Valle del Cauca and contributions from the regional tourism sector. It has an honorary board of directors composed of public, private, and academic entities that provide strategic guidance to the system.

SITUR Valle annually measures tourism sustainability across three dimensions: tourists, tourism service providers, and residents of the destination. For tourists, satisfaction levels and perception of the destination are evaluated; for service providers, the level of implementation of practices aligned with sustainability standards is assessed; and for residents, perceptions of tourism's impact on quality of life are analyzed. These



measurements integrate socio-cultural, economic, and environmental components and are incorporated into a monitoring and continuous improvement framework used for strategic decision-making.

As a tourism information system, SITUR Valle generates official statistics that guide sector planning at both regional and national levels. To achieve this, it develops and adapts data collection and analysis methodologies that respond to the needs of public and private tourism stakeholders. Statistical results and reports can be accessed at: <https://siturvalle.com/estadisticas>

The Tourism Observatory plays a fundamental role in managing tourism knowledge for the destination. The information collected is transformed into technical and scientific analysis that serves as input for public policy formulation, business strategies, and the planning of sustainable tourism development in the region.

List of Measurements and Indicators

INDICATOR	ANALYSIS AREA	DESCRIPTION	STATUS
Do you like the arrival of tourists?	Local Satisfaction	Perception applied to residents to measure social acceptance of tourism and attitudes toward visitor arrivals.	Available on website / Planned for 2025 / Household sustainability measurement
On a scale from 1 to 10, where 1 is Very Dissatisfied and 10 Very Satisfied, how would you rate your level of satisfaction with the arrival of tourists in the municipality?	Local Satisfaction	Resident satisfaction index measured through household surveys evaluating perceptions of tourism in the municipality.	Available on website / Planned for 2025 / Household sustainability measurement
Do you believe tourism will contribute, in the long term, to improving the economic situation of residents?	Local Satisfaction Destination Economic Benefits	Household perception measuring expectations regarding long-term economic benefits of tourism.	Available on website / Planned for 2025 / Household sustainability measurement
Is tourism your main economic activity?	Destination Economic Benefits	Identifies residents' direct economic dependence on tourism-related activities.	Available on website / Planned for 2025 / Household sustainability measurement



Of the following quality-of-life factors, which do you think have improved, worsened, or remained the same as a result of tourism? (Economy)	Local Satisfaction Destination Economic Benefits	Residents' perception of economic changes in quality of life associated with tourism development.	Available on website / Planned for 2025 / Household sustainability measurement
Rate as positive or negative the effect tourism has had on the environment	Climate Action	Citizens' perception of tourism's environmental impacts.	Available on website / Planned for 2025 / Household sustainability measurement
Which of the following environmental risks or issues related to sustainable tourism do you consider to be high, medium, or low risk? (Water pollution)	Water Management	Residents' perception of environmental risks associated with tourism.	Available on website / Planned for 2025 / Household sustainability measurement
Which of the following environmental risks or issues related to sustainable tourism do you consider to be high, medium, or low risk? (Waste generation)	Solid Waste Management	Residents' perception of waste generation associated with tourism.	Available on website / Planned for 2025 / Household sustainability measurement
Rate as positive or negative the economic impacts of tourism	Local Satisfaction Destination Economic Benefits	Household perception measuring the economic valuation of tourism.	Available on website / Planned for 2025 / Household sustainability measurement
Of the following economic benefits generated by tourism, which have improved, worsened, or remained the same? (Direct job creation)	Employment Destination Economic Benefits Governance	Residents' perception of tourism's contribution to job creation.	Available on website / Planned for 2025 / Household sustainability measurement
Of the following economic benefits generated by tourism, which have improved, worsened, or remained the same? (Income generation)	Destination Economic Benefits Tourism Seasonality Governance	Household perception of economic benefits generated by tourism.	Available on website / Planned for 2025 / Household sustainability measurement



Of the following economic benefits generated by tourism, which have improved, worsened, or remained the same? (Investment promotion)	Destination Economic Benefits Tourism Seasonality Governance	Residents' perception of tourism as a driver of local investment.	Available on website / Planned for 2025 / Household sustainability measurement
Of the following economic benefits generated by tourism, which have improved, worsened, or remained the same? (Development of tourism businesses)	Destination Economic Benefits Tourism Seasonality Governance	Residents' perception evaluating the growth of tourism businesses in the territory.	Available on website / Planned for 2025 / Household sustainability measurement
Of the following economic benefits generated by tourism, which have improved, worsened, or remained the same? (Better distribution of resources)	Destination Economic Benefits Tourism Seasonality Governance	Residents' Household perception of the distribution of economic benefits from tourism.	Available on website / Planned for 2025 / Household sustainability measurement
Does your establishment have accessible spaces for people with disabilities?	Accessibility	Household perception of the distribution of economic benefits from tourism.	Available on website / Planned for 2025 / Sustainability measurement in Tourism Service Providers
Indicate the type of accessible spaces available (auditory, cognitive, physical, mental, visual)	Accessibility	Identifies types of accessibility adaptations implemented by establishments.	Available on website / Planned for 2025 / Sustainability measurement in Tourism Service Providers
Has your establishment implemented any accessible information systems? (Braille, multimedia, sign language, audio, text visualization, etc.)	Accessibility	Evaluates implementation of accessible communication systems for visitors.	Available on website / Planned for 2025 / Sustainability measurement in Tourism Service Providers
Does your establishment have environmental management reports,	Governance	Measures existence of environmental reporting systems in establishments.	Available on website / Planned for 2025 / Sustainability measurement in



recycling reports, or waste statistics?			Tourism Service Providers
Do you measure the volume of waste generated by tourists?	Solid Waste Management	Evaluates practices for monitoring waste generation from tourism activity.	Available on website / Planned for 2025 / Sustainability measurement in Tourism Service Providers
Which of the following waste management practices has your company implemented? (3Rs, recycling, separation, reuse, composting, etc.)	Solid Waste Management	Identifies business practices for waste management and recycling.	Available on website / Planned for 2025 / Sustainability measurement in Tourism Service Providers
Does your company use recycled water?	Water Management	Measures use of recycled water as an environmental strategy.	Available on website / Planned for 2025 / Sustainability measurement in Tourism Service Providers
Which of the following measures has your company implemented to reduce water consumption? Response options: Water consumption monitoring; Study on water consumption and use within the establishment; Installation of low-consumption systems; Implementation of a water efficiency manual in accordance with quality standards; Installation of water-saving devices in showers and taps; Investment in low-consumption bathroom systems; None; Use of climate control systems; Other	Water Management	Evaluates water efficiency strategies in establishments.	Available on website / Planned for 2025 / Sustainability measurement in Tourism Service Providers



Does your company use renewable energy sources?	Energy Management	Measures adoption of renewable energy sources.	Available on website / Planned for 2025 / Sustainability measurement in Tourism Service Providers
Indicate the type of renewable energy used	Energy Management	Identifies renewable energy technologies used by establishments.	Available on website / Planned for 2025 / Sustainability measurement in Tourism Service Providers
What are the three main economic benefits perceived in your company as a result of sustainability actions or activities? Response options: Water consumption reduction; Study on water consumption and use within the establishment; Installation of low-consumption systems; Implementation of a water efficiency manual in accordance with quality standards; Installation of water-saving devices in showers and taps; Investment in low-consumption bathroom systems; None	Destination Economic Benefits	Evaluates perceived economic returns from sustainability practices.	Available on website / Planned for 2025 / Sustainability measurement in Tourism Service Providers
Total visitors; national visitors; international visitors; internal visitors	Tourism Seasonality Destination Economic Benefits	Statistical estimation of tourism flows based on surveys and secondary sources.	Available on website / Planned for 2025 / Tourism flow measurement
Hotel occupancy rate	Destination Economic Benefits Tourism Seasonality	Monthly monitoring of accommodation establishments measuring occupancy rates.	Available on website / Planned for 2025 / Supply measurement



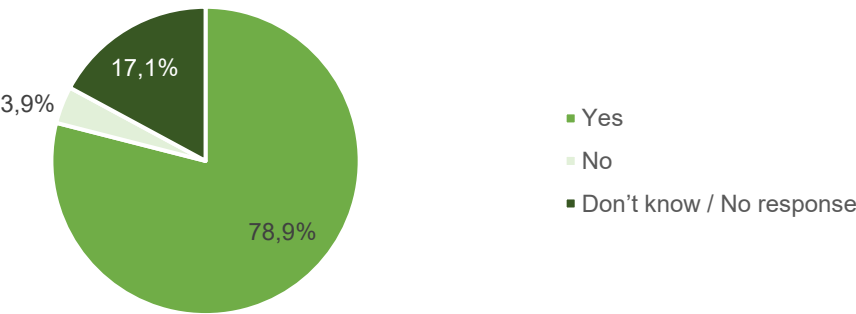
Tourism expenditure	Destination Economic Benefits	Visitor spending measured through surveys estimating average consumption in the destination.	Available on website / Planned for 2025 / Inbound tourism measurement
---------------------	-------------------------------------	--	---

Analysis of Indicators

Residents' Perception of the Economic Impacts of Tourism

The results of the 2024 household survey show a high level of social acceptance of tourism among residents of Santiago de Cali. A total of 78.9% of the population expressed a positive attitude toward the arrival of tourists, confirming a favorable social environment for the development of tourism activities. This indicator is key in terms of social sustainability, as it suggests that tourism growth does not generate widespread rejection or noticeable conflict with the local community.

Chart 1. Do you like the arrival of tourists?

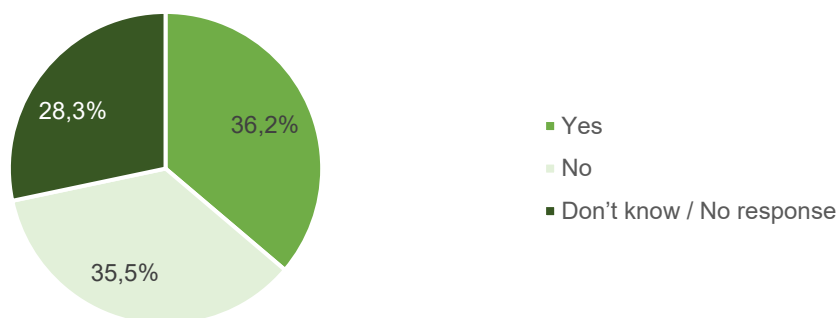


Overall satisfaction levels among residents regarding tourism are also high. More than 80% of responses are concentrated between 8 and 10 on the satisfaction scale, with a score of 9 being the most frequent (32.68%). This indicates that, beyond acceptance, there is a positive perception of how tourism is integrated into the daily life of the city.

However, when analyzing long-term economic expectations, the results show a more divided perception. 36.2% of respondents believe that tourism will contribute to improving the local economy, while 35.5% believe it will not, and 28.3% have no defined opinion. This distribution suggests that, although tourism is socially accepted, its long-term structural economic impact is not yet clearly perceived or guaranteed by a significant portion of the population.



Chart 2. Do you believe tourism will contribute, in the long term, to improving the economic situation of residents?



In line with the above, only 29.4% of residents report that tourism constitutes their main economic activity, while 44.9% indicate that they do not directly depend on the sector. This reflects that, although tourism is relevant, its integration into household economic structures remains partial and not widespread.

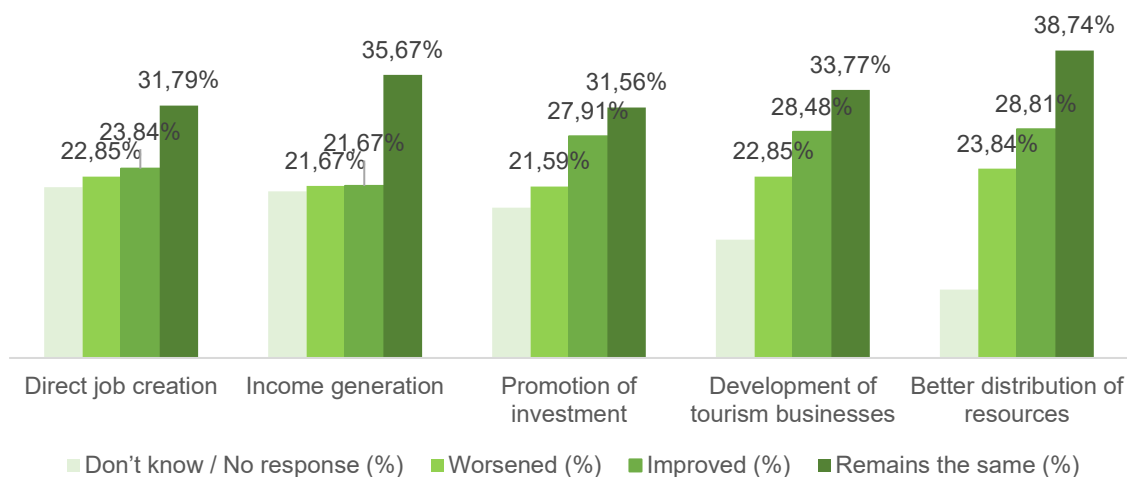
The analysis of quality of life shows a tendency toward stability rather than transformation. In variables such as the economy and housing, the majority of residents consider that conditions “remain the same,” exceeding 30% in both categories. Perceptions of improvement exist but are not predominant, while approximately 20–25% perceive a decline. These results indicate that tourism is not perceived as a strongly disruptive factor in quality of life, but rather as a phenomenon that coexists with urban dynamics without significantly altering structural conditions.

When directly assessing the economic impacts of tourism, 48.7% of residents rate them as positive, compared to 25.8% who consider them negative and 25.5% who have no defined opinion. This balance shows a favorable tendency, although with a relevant level of uncertainty, suggesting the need to strengthen public communication regarding the sector’s economic benefits.

The analysis of specific economic benefits confirms a perception of stability with moderate improvements. In indicators such as employment generation, income, investment, business development, and resource distribution, the predominant response remains “stays the same,” with percentages ranging between 31% and 39%. Perceptions of improvement range between 21% and 28%, while perceptions of decline remain close to 22–24%.



Chart 3. Of the following economic benefits generated by tourism, which do you think have improved, worsened, or remained the same?



This pattern reveals that residents do not perceive a generalized deterioration associated with tourism, but neither do they identify broadly transformative economic benefits. Tourism is viewed as a stable sector, with moderate positive contributions, yet still with room to strengthen its impact on the local economy.

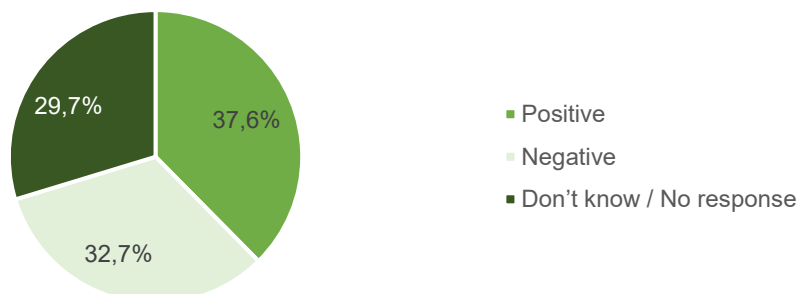
Therefore, the results suggest that Santiago de Cali presents a favorable social environment for tourism, with high levels of acceptance and a moderately positive economic perception. However, a gap persists between the social acceptance of tourism and the perception of its structural economic benefits, representing a strategic opportunity to strengthen policies related to benefit distribution, local tourism employment, and communication of the sector's real economic impacts.

Residents' Environmental Perception of Tourism

The results of the household survey show that the environmental perception of tourism is mixed and still evolving. 37.6% of residents rate the effect of tourism on the environment as positive, while 32.7% consider it negative, and 29.7% have no defined opinion. This distribution indicates that there is no clear consensus regarding the environmental impact of tourism, suggesting that perceptions of its actual ecological effects remain unclear.



Chart 4. Rate as positive or negative the effect tourism has had on the environment



When analyzing specific risks, residents identify moderate environmental concerns rather than critical ones. In the case of water pollution, most respondents perceive it as a low or medium risk, while the proportion that considers it a high risk is relatively smaller. A similar pattern is observed in waste generation: the dominant perception is concentrated in medium and low risks, indicating that residents do not perceive an immediate environmental crisis associated with tourism, but they do recognize potential impacts that require monitoring.

These results indicate that tourism in Cali is not widely perceived as environmentally harmful, but neither is it viewed as fully sustainable. There is significant room to strengthen communication and environmental education strategies that highlight the sustainability efforts of the sector.

Environmental Management in Tourism Service Providers

At the business level, the results show relevant progress, but also important gaps in the adoption of environmental practices.

A total of 67.9% of establishments report having environmental management reports or waste statistics, reflecting a significant level of environmental formalization within the sector. However, only 13% measure the volume of waste generated by tourists, indicating that quantitative monitoring remains limited.

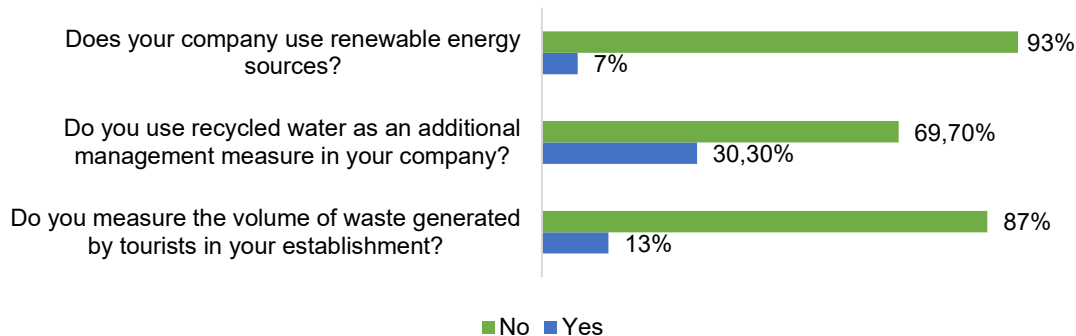
Regarding waste management, the most widespread practice is waste separation (38.1%), followed by the implementation of recycling points (33.3%) and material reuse (28.6%). These figures show that environmental awareness exists, but actions are still concentrated on basic management measures.

The use of recycled water remains low: 69.7% of establishments do not use it. Likewise, a significant proportion reports not having adopted structural measures to reduce water consumption. This highlights water efficiency as a priority area for improvement.

In terms of energy, only 7% of establishments use renewable energy sources. Although there are cases of adoption of wind and hybrid technologies, the penetration of clean energy within the tourism sector remains incipient.



Chart 5. Adoption of environmental practices



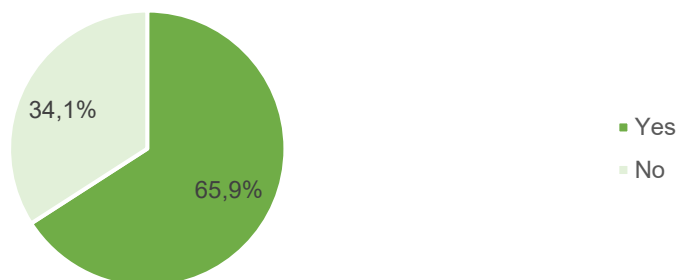
Despite these limitations, service providers recognize economic benefits derived from sustainability, indicating that there is a favorable foundation to strengthen environmental investments if appropriate incentives are implemented.

Accessibility and Inclusion in the Tourism Sector

In 2024, 65.9% of tourism service providers reported having accessible spaces for people with disabilities, reflecting progress in inclusive infrastructure within the destination. However, 34.1% still lack adequate adaptations, indicating a significant gap in coverage.

Existing adaptations are primarily focused on infrastructure for physical disabilities (80.95%), while adaptations for visual (14.29%) and mental disabilities (4.76%) are considerably lower, and no specific implementations are reported for auditory or cognitive disabilities. This suggests that accessibility in the destination is still mainly focused on reduced mobility, without comprehensively addressing other accessibility needs.

Chart 6. The establishment has accessible spaces for people with disabilities



Regarding accessible information systems, 66.67% of establishments implement text visualization as their main support tool, while other solutions such as sign language, accessible multimedia devices, or auditory systems show low levels of adoption (around 4.76% each). Additionally, 19.05% reported having no accessible information system in



place. These results indicate that communicational accessibility remains a pending challenge, particularly in the pursuit of universal and inclusive tourism standards.

From a complementary perspective of business sustainability —closely linked to inclusion and social responsibility— 67.9% of establishments report having environmental management reports or waste statistics, although only 13% measure the volume of waste generated by tourists. The most commonly implemented practices include waste separation (38.1%) and the installation of recycling points (33.33%), while the use of recycled water (30.3%) and renewable energy (7%) remains limited. Overall, these results show initial progress in accessibility and environmental management, but also highlight the need to strengthen structural measures to consolidate a more inclusive and sustainable tourism model.

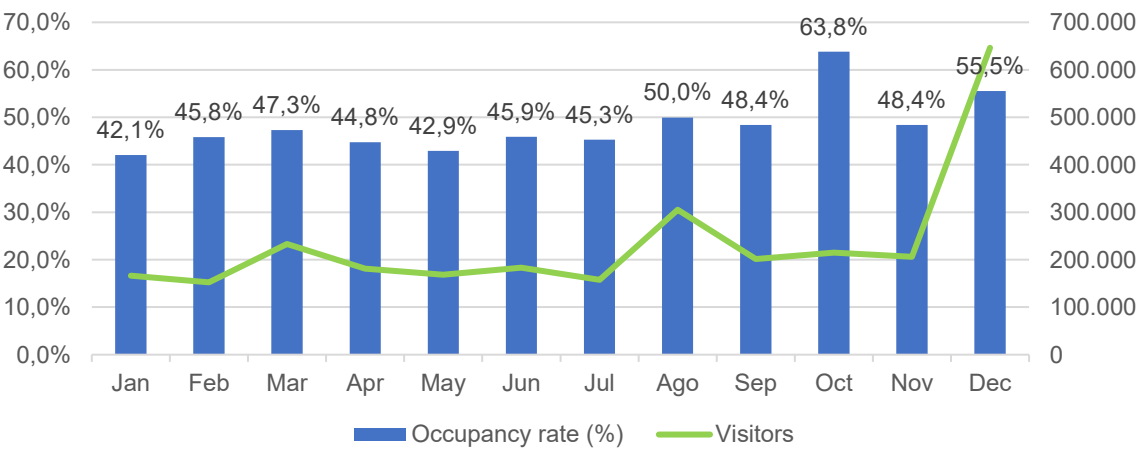
Tourism Demand Performance

During 2024, Santiago de Cali recorded a total of 2,816,349 visitors, confirming its position as one of the main urban tourism hubs in southwestern Colombia. The market structure continues to be dominated by national tourism, which accounts for 55.15% of total visitors, followed by intradepartmental tourism (32.91%) and international tourism (11.94%).

The monthly distribution of visitor flows shows a marked seasonality, with clear peaks in August, October, and December. October recorded the highest hotel occupancy rate of the year (63.83%), associated with the concentration of high-impact cultural and recreational events. December registered the highest volume of visitors, exceeding 640,000 arrivals, confirming the importance of the year-end season as a key driver of tourism activity.

The average annual hotel occupancy rate stands at 48.36%, reflecting stable demand, although with significant seasonal variations. The lowest occupancy levels are concentrated in the first half of the year, while the second half shows sustained recovery, driven by events and holiday seasons.

Chart 7. Hotel occupancy and number of visitors





Tourism expenditure shows an upward trend toward the end of the year. The average annual expenditure is estimated at COP 943,194 per visitor, with a peak in December exceeding two million pesos in total monthly spending. This pattern confirms that the final part of the year not only concentrates a higher number of visitors but also greater consumption capacity.

Therefore, indicators of visitor flow, occupancy, and expenditure reflect a destination with solid demand, predictable seasonality, and strong economic generation capacity, although highly dependent on specific seasons. This suggests the need for strategies aimed at distributing tourism flows more evenly throughout the year.

Conclusions

The year 2024 confirms that Santiago de Cali maintains a strong position as an urban tourism destination, with stable visitor volumes, high social acceptance of tourism, and an overall positive perception of its economic impacts. The results show that tourism has been relatively well integrated into the city's daily life, without generating widespread rejection among residents, which constitutes a fundamental pillar for the sustainability of the destination.

However, the analysis also reveals that the economic benefits of tourism are perceived as moderate rather than transformative. Most residents identify stability rather than substantial improvement in economic and quality-of-life indicators, suggesting that tourism has not yet translated into widely visible structural impacts for the population. A gap persists between the social acceptance of tourism and the perception of its long-term economic contribution.

From an environmental perspective, residents show a moderate position: tourism is not widely perceived as harmful, but neither is it considered fully sustainable. At the business level, although there have been advances in basic environmental management practices, the adoption of structural measures—particularly in water efficiency, waste measurement, and renewable energy—remains limited.

The tourism sector shows important progress in physical accessibility, but still faces challenges in achieving comprehensive inclusion, particularly in communicational accessibility and specialized services for different types of disabilities.

In terms of demand, the destination maintains a stable tourism flow with marked seasonality and a high dependence on specific periods. Tourism expenditure shows growth toward the end of the year, confirming the sector's economic capacity, but also highlighting the need to diversify tourism activity throughout the calendar.

Finally, the operational sustainability of the tourism information system continues to be a structural challenge. Despite financial limitations, SITUR Valle has maintained the technical continuity of the observatory, consolidating its role as a key infrastructure for both public and private decision-making.



Recommendations for the Destination

1. Strengthen the economic distribution of tourism: Implement strategies that allow tourism benefits to reach a greater number of households, particularly through local employment, value chain linkages, and business formalization.
2. Develop a sectoral environmental agenda: Promote incentives for the adoption of water efficiency, waste measurement, and renewable energy in tourism establishments.
3. Expand the universal accessibility approach: Move from basic physical accessibility to comprehensive inclusion, incorporating technological and communication solutions.
4. Reduce tourism seasonality: Design events and tourism products outside peak seasons to stabilize annual demand.
5. Strengthen public communication of tourism's economic impact: Increase visibility of data and results that connect tourism with citizen well-being.
6. Ensure financial sustainability of the tourism information system: Establish permanent institutional funding mechanisms to guarantee continuity of measurements.
7. Integrate tourism into urban and social planning: Align tourism policies with sustainable territorial development.

Achievements in 2024

During 2024, the Cali Tourism Observatory – SITUR Valle del Cauca achieved significant progress in technological modernization, institutional strengthening, and international positioning, reaffirming its role as a strategic infrastructure for tourism intelligence in the territory.

One of the main achievements of the year was the comprehensive update of measurement dashboards, optimizing their technological architecture to facilitate public access, improve data traceability, and strengthen system stability. This upgrade transformed data visualization into a more accessible, dynamic, and decision-oriented tool, benefiting public, private, and academic stakeholders.

In terms of operational sustainability, a strategic project was formulated with FONTUR aimed at ensuring the continuity of the observatory in the following period. This project seeks not only to sustain statistical measurements but also to incorporate specialized tourism intelligence through the acquisition of advanced analytical tools such as Mabrian, enhancing the territory's capacity to analyze visitor behavior, global trends, and destination competitiveness.

At the international level, SITUR Valle maintained its active participation in the International Network of Sustainable Tourism Observatories (INSTO) of UN Tourism, where annual results and methodological advancements were presented. This participation reaffirms the observatory's commitment to global measurement standards and positions Cali as a



relevant actor within the international network of destinations monitoring tourism sustainability.

Overall, these achievements reflect the observatory's transition toward an advanced tourism analytics model, with greater technological integration, institutional sustainability, and international projection, laying the foundation for a new stage of system consolidation in 2025.

Sustainability Challenges of the Cali Tourism Observatory – SITUR Valle

The origin, evolution, and institutional framework of the Regional Tourism Information System – SITUR Valle del Cauca are extensively described in the 2023 report. That document outlines the background of the CITUR–SITUR program, its national implementation, and the adjustments made by territories following the suspension of funding by the National Government.

For 2024, the main challenge for SITUR Valle remains and intensifies: ensuring the financial and operational sustainability of the system, which is essential to guarantee the continuity of tourism measurements under technical standards comparable at national and international levels.

Following the suspension of FONTUR funding for Regional Tourism Information Systems, SITUR Valle has historically depended on contributions from territorial entities and the private sector. In this context, the Government of Valle del Cauca has been the primary financial and operational supporter of the system. However, in 2024, no financial contributions were received from the Mayor's Office of Santiago de Cali, which represented a significant limitation for sustaining certain statistical operations, particularly those aligned with measurement schemes previously funded by FONTUR.

This situation created additional challenges in maintaining the periodicity, coverage, and depth of certain measurements, requiring the system to prioritize strategic indicators, optimize available resources, strengthen in-kind contributions, and enhance coordination with business associations and tourism stakeholders to ensure the continuity of the observatory.

Despite these limitations, SITUR Valle has operated continuously since August 2020 as the official source of tourism information for the department, supported by its prioritization within the regional tourism public policy. This institutional positioning reinforces the need to secure stable resources to maintain a robust, permanent information system aligned with the destination's planning needs. Therefore, SITUR Valle continues to be a key actor in generating data that supports public policy decision-making and the sustainable tourism development of the territory.

Objectives for 2025

- Consolidate SITUR Valle as a comprehensive regional tourism intelligence platform, strengthening advanced analytics through the integration of new strategic data sources



such as Mabrian, tourism housing indicators, and hotel monitoring systems, ensuring timely, interoperable, and high-quality information for public and private decision-making.

- Deepen the technological transformation of the Observatory, expanding the development of dynamic dashboards, process automation, and interactive visualization systems to enable open access to tourism indicators, strengthening transparency, traceability, and data accessibility.
- Strengthen the use of data for applied knowledge generation, through the SiturLab innovation laboratory, promoting university research, interdisciplinary analysis, and collaborative projects that transform tourism data into concrete solutions for the territory.
- Integrate specialized tourism intelligence into the monitoring system, using tools for analyzing visitor behavior, air connectivity, tourism housing, and hotel sector performance, in order to anticipate trends and improve strategic destination planning.
- Expand institutional coordination within the tourism ecosystem, consolidating alliances with universities, research centers, business associations, and national and international organizations to strengthen the governance of the tourism information system.
- Ensure the financial and operational sustainability of the observatory, securing funding mechanisms that guarantee technical continuity, innovation, and the expansion of analytical capabilities.
- Position SITUR Valle as a national benchmark in tourism intelligence, promoting knowledge transfer, best practices, and innovation models to other territories.