

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

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Escuela de
Turismo



Content Summary

The 2025 Annual Tourism Report provides a comprehensive overview of the performance of the tourism sector in Santiago de Cali and the progress of the Regional Tourism Information System – Situr Valle del Cauca as a tourism intelligence platform for the territory. The report begins with an updated description of the destination, its economic, cultural, and environmental context, as well as its positioning within the national and international tourism landscape.

The document then analyzes tourism performance in 2025 based on key tourism demand indicators, including visitor flows, hotel occupancy, and tourism expenditure. This analysis makes it possible to identify market trends, seasonality patterns, and the economic contribution of tourism to the destination, as well as its evolution compared to the previous year.

The report also presents the results of tourism sustainability measurements conducted in the destination, including residents' perceptions of the economic, social, and environmental impacts of tourism, as well as the assessment of sustainability practices implemented by tourism service providers. These results allow for an analysis of social acceptance of tourism, the economic benefits perceived by the community, and the level of adoption of environmental and accessibility practices within the tourism business sector.

Additionally, the document describes the institutional role of the Tourism Observatory and the status of the Situr Valle system during the year, including its governance model, coordination with public entities, industry associations, and universities, as well as progress in strengthening the system's analytical capacities. In this context, initiatives aimed at improving the generation and use of tourism information are presented, including the development of new analytical dashboards, the integration of new data sources, and the strengthening of applied research spaces through strategies such as SiturLab.

The measurements developed in the report are aligned with the key areas of interest of the International Network of Sustainable Tourism Observatories (INSTO) of UN Tourism, addressing topics such as tourism seasonality, economic benefits for the destination, governance, residents' satisfaction, environmental management, accessibility, and other aspects related to tourism sustainability.

Finally, the report presents the general conclusions of the monitoring carried out during the year and outlines strategic recommendations aimed at strengthening the sustainable tourism development of the destination. These recommendations seek to contribute to a better temporal distribution of demand, strengthen the environmental sustainability of the sector, improve the inclusion and accessibility of the tourism offer, and consolidate the tourism intelligence system as a key tool for planning and decision-making in the tourism sector of the territory.



Santiago de Cali

Destination Description

Santiago de Cali, capital of the Valle del Cauca department, is a Colombian city of great historical, cultural, and economic relevance. Founded in 1536 by Sebastián de Belalcázar and established as a municipality in 1863, it has evolved into a special district, consolidating its role as a strategic hub in southwestern Colombia. Internationally recognized as the world capital of salsa, in 2024 its *Cali Salsa Music and Dance Complex* was inscribed on the National Representative List of Intangible Cultural Heritage by the Ministry of Cultures, Arts and Knowledge, strengthening its cultural identity and positioning this heritage as a strategic tourism asset.

During 2024, the city reached a major international milestone by hosting the COP16 Biodiversity Conference, one of the most important multilateral environmental events worldwide. The conference brought together delegations from nearly 200 countries, positioning Cali as a global hub for discussions on conservation, sustainability, and climate action. Complementarily, the Biodiversity Week held in 2025 expanded this agenda by integrating academic, cultural, business, and community spaces, promoting social appropriation of environmental knowledge and linking the local community to the international agenda. These events not only generated an immediate impact on hotel occupancy and international visitor arrivals, but also left a legacy in terms of global visibility, institutional strengthening, and the consolidation of sustainability as a cross-cutting pillar of tourism development.

In 2025, Cali continues to capitalize on this positioning, integrating biodiversity and sustainability into its tourism value proposition. The destination is advancing toward a model that combines cultural heritage, natural richness, and strategic management, reinforcing its image as a city capable of hosting high-level international events while promoting responsible tourism aligned with global standards.

Economically, Cali maintains its role as one of the country's main urban centers. Its strategic location, close to the Port of Buenaventura, facilitates national and international trade, supporting logistics, industrial, and commercial development. With a population of over two million inhabitants, the city combines cultural diversity, economic dynamism, and a privileged natural environment, shaping a differentiated value proposition within the national context.

Role of Tourism in Cali

Tourism in Cali is consolidated as a strategic pillar for the economic, social, and environmental development of the territory. Beyond the growth in visitor numbers, the destination has progressed toward a more sustainable, articulated, and intelligent model, in which culture, biodiversity, and governance are integrated as key drivers of competitiveness.



In the cultural sphere, Cali reaffirms its position as the world capital of salsa, strengthening experiential offerings that connect tradition, identity, and the creative economy. The recognition of the Cali Salsa Music and Dance Complex as national intangible cultural heritage consolidates culture as a structural asset of the destination and as a driver of cultural tourism. Festivals, heritage routes, and community-based experiences continue to expand the tourism offer, promoting a model that values and protects local identity.

In the context following COP16 and Biodiversity Week, tourism in Cali increasingly incorporates sustainability as a cross-cutting axis. The territory's biodiversity and natural heritage are not only projected as tourism attractions but also as a shared responsibility among public, private, and community stakeholders. Spaces such as the Botanical Garden, Cali Zoo, the Cristo Rey trail, and rural ecotourism routes strengthen a narrative of conservation, environmental education, and responsible tourism, aligned with global commitments on climate action and ecosystem protection.

In the MICE segment, the city strengthens its capacity to host high-level international events, reinforcing its reputation as a strategic destination for conferences, multilateral meetings, and corporate events. The organizational experience gained from COP16 enhanced institutional coordination and international trust in the destination, consolidating competitive infrastructure and logistical capacity.

Likewise, health and wellness tourism continues to be a distinctive component of the destination, supported by nationally and internationally recognized medical institutions. This expands the visitor profile and contributes to the diversification of the tourism offer.

Tourism Performance of Cali

According to SITUR Valle, in 2025 Santiago de Cali recorded a total of 2,348,166 visitors. Of this total, 774,227 were internal visitors, meaning residents from the Valle del Cauca department, representing approximately 32.9% of the total. Meanwhile, 1,273,675 national visitors, from other regions of the country, accounted for 54.2%, and 300,264 international visitors represented around 12.8% of total arrivals to the destination.

The monthly behavior of tourist flows showed a marked seasonal pattern throughout the year. The first months recorded moderate levels of visitation, with 143,829 visitors in January and 114,113 in February, while from March onwards a gradual recovery in tourist flows was observed. During the second half of the year, a progressive increase became evident, with particularly notable peaks in September (235,720 visitors) and October (330,744 visitors), the latter partly associated with the impact of international events such as Biodiversity Week and the dynamism of business and meetings tourism in the city.

The end of the year showed one of the highest levels of tourist arrivals, with 347,510 visitors in December, reflecting the importance of the holiday season and cultural and festive events such as the Cali Fair in the destination's tourism dynamics. This trend confirms the strong influence of events, festivals, and year-end seasons in attracting visitors to the city.



In terms of market composition, national tourism continued to represent the largest share of visitors, followed by intra-departmental tourism. However, international tourism maintained a relevant share of total arrivals, reflecting the gradual positioning of Santiago de Cali in international markets and the strengthening of its visibility as a cultural, events, and nature destination within the regional context.

These 2025 results reflect a stable tourism dynamic, with peaks associated with specific seasons and strategic events, reaffirming the role of tourism as a key economic activity for the city and the Valle del Cauca department.

Role of the Observatory in 2025

Organization and Institutional Participation Process in Indicator Measurement

For the measurement of tourism sector indicators, the Cali Tourism Observatory – SITUR Valle (Valle del Cauca Tourism Information System) maintains a governance model based on the participation of public institutions, private stakeholders, and representative business associations within the sector, as well as its integration 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 is supported institutionally by the Tourism Secretariats of the Valle del Cauca department and the district of Santiago de Cali, within the framework of cooperation agreements and inter-institutional coordination, ensuring the continuity of strategic measurements and the progressive strengthening of the regional tourism information system.

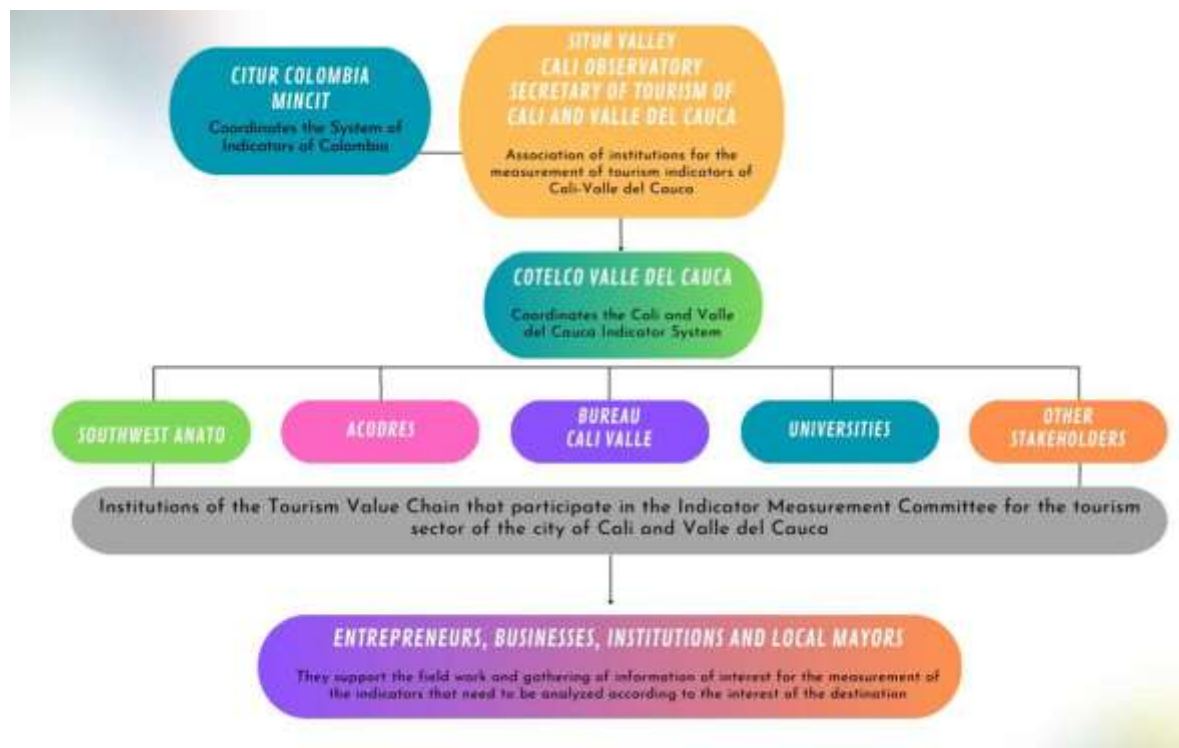
COTELCO Valle del Cauca, as the system operator, actively participates in the management of the measurement system and in the professional technical committee that defines indicators, data collection methods, and results analysis, as well as in the preparation of statistical bulletins published on www.siturvalle.com.

The process is carried out jointly with regional universities, whose research groups contribute academic analysis and technical validation. In 2025, this collaboration was strengthened through the SiturLab strategy, a tourism innovation lab aimed at promoting applied research, the use of tourism data in academic work, scientific articles, and territorial analysis projects. Within this framework, visits and outreach sessions were conducted in universities across the department, promoting the use of data as a tool for knowledge generation and decision-making.

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



The observatory's governance model is based on public-private coordination and the continuous strengthening of technical capacities, enabling the expansion of measurement coverage, the improvement of data quality, and the consolidation of an evidence-based management culture for the sustainable tourism development of the destination.



Status of SITUR Valle in 2025

During 2025, the Valle del Cauca Regional Tourism Information System – SITUR Valle consolidated its technical operations and advanced toward a more robust, technological, and integrated tourism analytics model. The system maintained its permanent scheme of statistical measurement of regional tourism, ensuring the monthly monitoring of key indicators such as inbound tourism, tourism supply and employment characterization, visitor flows, and the estimation of internal, national, and international tourist arrivals to the destination.

At the annual level, SITUR Valle continued to develop the census of tourism service providers, the comprehensive measurement of tourism sustainability across its three dimensions (tourists, service providers, and residents), and the statistical monitoring of strategic destination events such as the Petronio Álvarez Pacific Music Festival, the Cali Fair, and the World Salsa Festival. These measurements make it possible to assess tourism impacts from economic, social, and environmental perspectives, aligning with international standards and the key areas promoted by the INSTO Network.



One of the most significant advancements in 2025 was the incorporation of specialized tourism intelligence through the use of Mabrian data, an international platform based on big data and digital perception analysis of destinations. This tool complemented traditional statistical measurement by providing insights into online reputation, source markets, air connectivity, and demand behavior. As a result, a dynamic public dashboard was developed for sector stakeholders, strengthening transparency, access to strategic information, and evidence-based decision-making.

At the same time, SITUR Valle updated and optimized its dynamic analytical dashboards, enhancing data processing structures and improving data traceability, security, and stability. These improvements enabled the standardization of methodologies, enhanced the visualization of indicators, and ensured greater reliability in the reports generated, reducing operational risks and facilitating timely access to strategic information for stakeholders.

In 2025, the observatory’s funding was primarily supported by financial resources from the Government of Valle del Cauca, the Cali Mayor’s Office, and FONTUR, along with contributions from the regional tourism sector to ensure the continuity of the system, and in-kind support through tourism promoters assisting with survey implementation and field data collection.

The core operational team consists of the SITUR Valle technical staff, including technical management, professionals in economics, statistics, and tourism information management, who ensure the methodological and operational continuity of the system. They are supported by field surveyors and a network of tourism promoters that facilitate data collection across the territory. Collaboration with universities, strengthened through SiturLab, contributes to the development of applied research and positions the system as a regional reference in tourism knowledge management.

Therefore, in 2025 SITUR Valle consolidated its transition toward a more comprehensive information system, combining statistical measurement, advanced tourism intelligence, and academic collaboration, strengthening its strategic role in tourism planning, competitiveness, and sustainability in Cali and the Valle del Cauca.

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	Local Satisfaction	Resident satisfaction index	Available on website / Planned for 2025 /



Dissatisfied and 10 Very Satisfied, how would you rate your level of satisfaction with the arrival of tourists in the municipality?		measured through household surveys evaluating perceptions of tourism in the municipality.	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?	Destination Economic Benefits	Residents' Household perception of the distribution of economic benefits from tourism.	Available on website / Planned for 2025 / Household sustainability measurement



(Better distribution of resources)	Tourism Seasonality Governance		
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, recycling reports, or waste statistics?	Governance	Measures existence of environmental reporting systems in establishments.	Available on website / Planned for 2025 / Sustainability measurement in 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	Available on website / Planned for 2025 / Sustainability



		environmental strategy.	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	I 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;	Destination Economic Benefits	Evaluates perceived economic returns from sustainability practices.	Available on website / Planned for 2025 / Sustainability measurement in Tourism Service Providers



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			
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

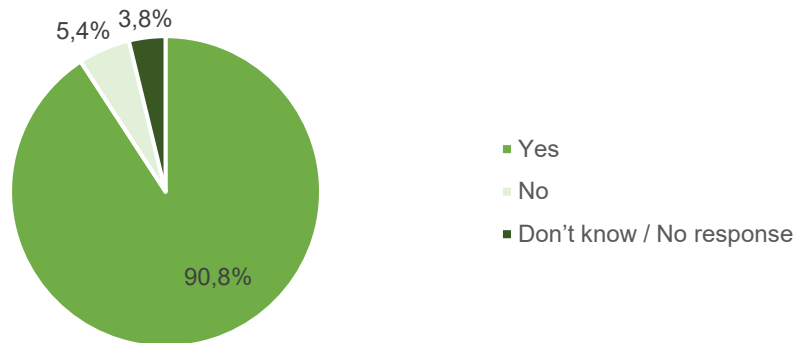
Analysis of Indicators

Social Acceptance of Tourism

The results of the household survey conducted in 2025 show a high level of social acceptance of tourism among residents of Santiago de Cali. In this regard, 90.8% of respondents stated that they appreciate the arrival of tourists to the city, while only 5.4% expressed a negative perception, reflecting a broadly favorable attitude of the local community toward the development of tourism in the destination.



Chart 1. Do you like the arrival of tourists?



This positive perception is also reflected in satisfaction levels associated with the presence of visitors. On a scale from 1 to 10, where 10 represents the highest level of satisfaction, 37.79% of residents gave the maximum rating, followed by 22.04% who rated it 8 and 15.02% who rated it 9. These results indicate that the majority of the population perceives tourism positively and maintains a high level of satisfaction with its presence in the city.

Overall, the findings highlight a favorable context of social acceptance of tourism in the destination, which constitutes a key element for the development of sustainable tourism strategies. A positive perception among residents contributes to strengthening the relationship between visitors and the local community, as well as enhancing the social sustainability of the tourism sector.

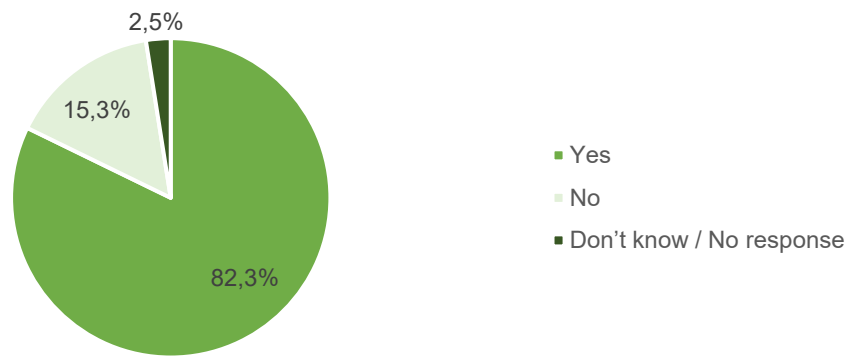
Residents' Perception of the Economic Impacts of Tourism

The results of the measurement show that the resident population in Santiago de Cali maintains a predominantly favorable perception of the economic impacts of tourism. In general terms, 49.4% of residents consider the economic impacts of tourism to be positive, while 33% perceive them as negative and 17.5% do not have a defined opinion.

Regarding long-term expectations, the perception is even more favorable. 82.3% of respondents believe that tourism will contribute to improving the economic situation of residents, while 15.3% think otherwise and 2.5% do not have a defined opinion.



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

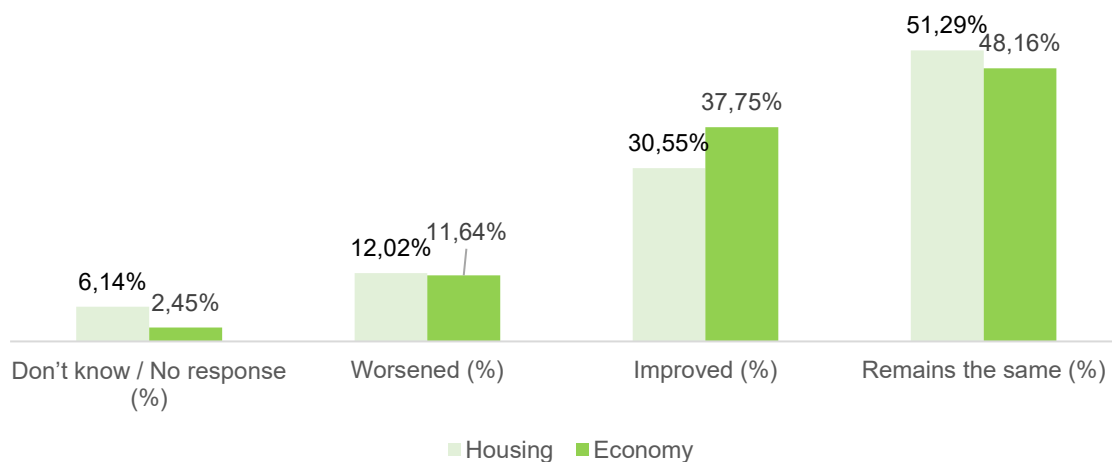


When analyzing residents' perceptions of different components of quality of life associated with tourism, varied results are observed. In the case of the local economy, 48.16% of respondents believe it has improved as a result of tourism, while 37.75% perceive that it has remained the same and 11.64% consider that it has worsened.

Regarding housing, the predominant perception is one of stability: 51.29% of residents believe the situation has remained the same, while 30.55% perceive improvements and 12.02% consider that it has worsened.

These results suggest that, although tourism is perceived as a factor that contributes to the economic dynamism of the destination, its impact on other dimensions of quality of life shows more moderate changes.

Chart 3. Residents' perception of changes in quality of life factors associated with tourism



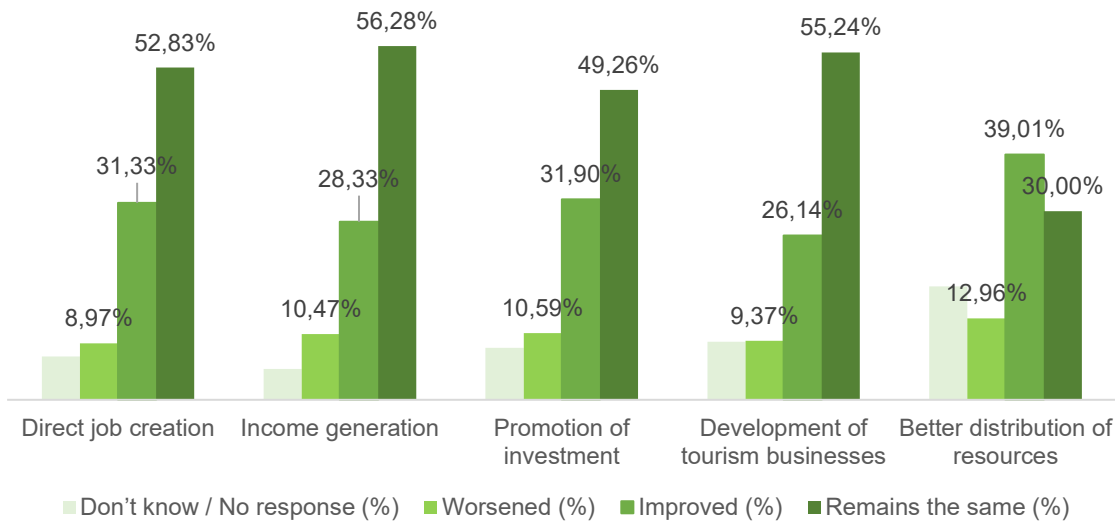


The analysis of specific economic benefits associated with tourism reveals a predominantly stable perception among the resident population. Across most of the indicators evaluated, the option “remains the same” accounts for the highest percentages, particularly in income generation (56.28%), development of tourism businesses (55.24%), direct job creation (52.83%), and investment promotion (49.26%).

However, perceptions of improvement are also identified in some areas. 31.90% of residents believe that tourism has improved investment promotion, 31.33% perceive improvements in direct job creation, 28.33% in income generation, and 26.14% in the development of tourism businesses. In contrast, perceptions of decline are lower, with values close to 10% across most indicators.

A particular case is observed in the distribution of resources, where 39.01% of residents do not know or did not respond, 30.00% believe it remains the same, and only 12.96% perceive an improvement. This suggests that, although tourism is recognized as a relevant economic factor, there are still gaps in perception or awareness regarding how its benefits are distributed among the local population.

Chart 4. Of the following economic benefits generated by tourism, which do you think have improved, worsened, or remained the same?



The results reflect a moderate perception of the economic benefits of tourism: residents recognize progress in some indicators, but primarily perceive continuity compared to previous years. This highlights the need to strengthen the visibility, distribution, and communication of the economic benefits generated by tourism activity in Santiago de Cali.

Residents’ Environmental Perception of Tourism

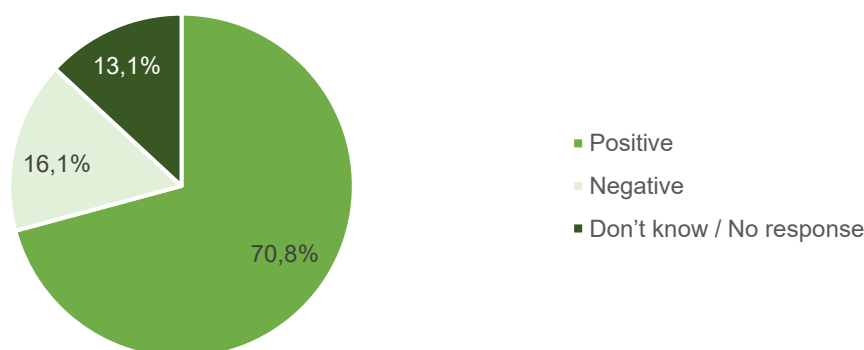
The results of the household survey conducted in 2025 show that residents of Santiago de Cali hold a predominantly positive perception of tourism’s impact on the environment.



Overall, 70.8% of respondents consider that tourism has a positive effect on the environment, while 16.1% perceive it as negative and 13.1% indicate that they do not have a defined opinion.

This result reflects that a significant proportion of the population associates tourism development with processes of valorization, conservation, or increased visibility of the destination's natural resources.

Chart 5. Rate as positive or negative the effect tourism has had on the environment



However, when more specific environmental risks associated with tourism are analyzed, residents identify several issues that could represent significant pressures on the environment. Waste generation stands out as the main environmental risk related to tourism activity, as 51.48% of respondents consider it a high risk, while 30.49% perceive it as a medium risk.

Similarly, inadequate wastewater management is also perceived as a significant environmental risk, being considered high risk by 42.24% of residents and medium risk by 34.24%. Other environmental impacts associated with tourism are also highlighted by the local population, such as noise pollution, perceived as high risk by 43.47% of respondents, soil contamination (40.1%), and air pollution (38.27%).

Additionally, residents express concern about the potential effects of tourism-related urban development. In particular, the construction of tourism infrastructure near natural reserves, water sources, or forests is perceived as a high risk by 38.5% of respondents and as a medium risk by 37.27%, highlighting the importance of strengthening territorial planning and environmental management mechanisms in tourism development.

These findings indicate that, although residents maintain a generally positive perception of the relationship between tourism and the environment, they also identify potential risks associated with waste management, pollution, and tourism infrastructure development, emphasizing the need to continue promoting sustainable tourism strategies and responsible environmental management in the destination.



Environmental Management in Tourism Service Providers

The results of the measurement conducted among tourism service providers in 2025 allow for an analysis of the level of adoption of environmental sustainability practices within the tourism sector of the destination. Overall, progress is observed in the implementation of certain actions related to waste management and resource efficiency, although significant challenges remain in terms of measurement, monitoring, and transition toward renewable energy sources.

First, regarding waste management, 73.82% of establishments report implementing actions related to the 3Rs (reduce, reuse, recycle), indicating a significant level of adoption of basic responsible waste management practices within the sector. Additionally, 25.69% report having ecological points for waste separation, while 7.48% indicate reusing non-biodegradable materials, and 4.24% implement rationing practices in solid waste usage.

However, despite the adoption of these practices, the monitoring of environmental impacts remains limited. 88.3% of establishments indicated that they do not measure the volume of waste generated by tourists, while only 11.7% carry out some form of measurement. This situation highlights a significant challenge in terms of generating environmental data that would allow for a more accurate assessment of tourism impacts on the destination.

Regarding water resource management, the results show that 79.7% of establishments do not use recycled water, while 20.3% do implement such practices. In terms of measures to reduce water consumption, 36.41% report implementing consumption control actions, 21.2% have invested in low-consumption bathroom systems, and 17.46% have installed water-saving devices in showers and taps.

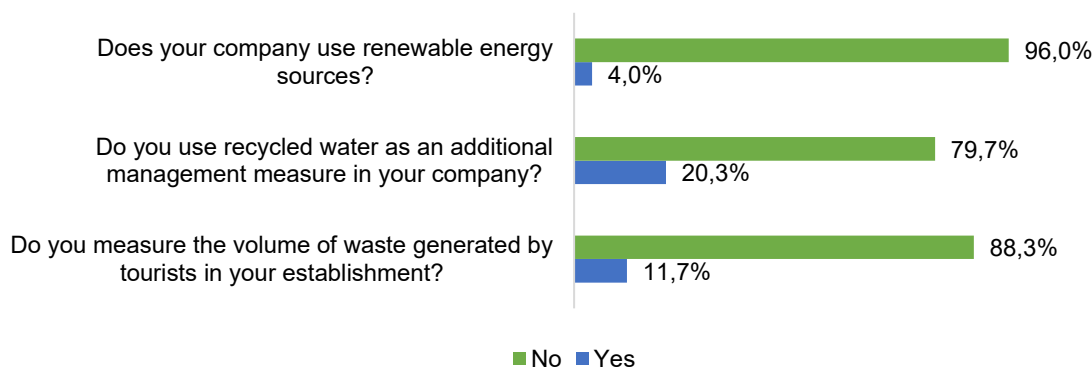
Nevertheless, 63.09% of establishments report not having implemented any specific measures to reduce water consumption, indicating that there is still significant room for improvement in strengthening water efficiency strategies within the tourism sector.

Regarding the use of renewable energy, the results show a low level of adoption. 96% of establishments reported not using renewable energy sources, while only a small proportion have begun to incorporate such solutions. Among those that do use renewable energy, solar energy is the most commonly adopted source (30.67%), followed by other alternatives to a lesser extent.

Additionally, 68.5% of establishments report having environmental management reports, recycling reports, or waste statistics, reflecting progress in the incorporation of environmental management tools within the sector. However, 31.5% of establishments still lack such monitoring mechanisms, suggesting the need to strengthen environmental monitoring and reporting systems across the destination.



Chart 6. Adoption of environmental practices



These results show that tourism service providers have begun to incorporate basic environmental sustainability practices, particularly in waste management. However, significant challenges remain in terms of impact measurement, efficient water management, and the adoption of renewable energy, which represent key opportunities to strengthen the environmental sustainability of the tourism sector in the territory.

Accessibility and Inclusion in the Tourism Sector

The measurement conducted among tourism service providers also allows for an analysis of the level of implementation of practices related to accessibility and inclusion within the tourism sector of the destination. These aspects are essential to ensure a more equitable and accessible tourism experience for different population groups, including persons with disabilities.

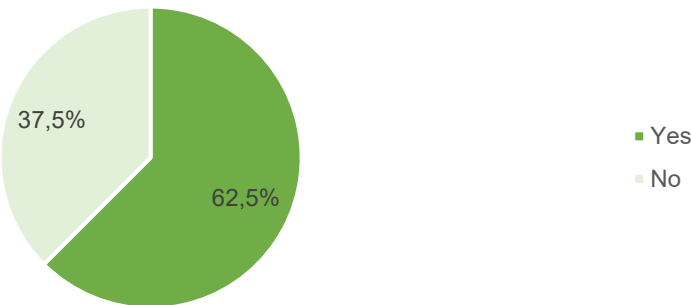
Overall, 62.5% of establishments report having accessible spaces for people with disabilities, while 37.5% indicate that they do not have such infrastructure. This result shows that, although a significant portion of the sector has begun to incorporate accessibility criteria, there is still considerable room for improvement in adapting tourism establishments.

Among establishments with accessible spaces, accessibility for persons with physical disabilities is the most common, present in 68.5% of cases. To a lesser extent, adaptations for other types of disabilities are reported, such as visual disabilities (5.25%) and hearing disabilities (2%), suggesting that tourism infrastructure remains primarily focused on physical adaptations, with less development of solutions for other accessibility needs.

Regarding information accessibility, the results indicate that the implementation of adapted tools remains limited. 16.21% of establishments report not having implemented any accessible information scheme, while only a very small proportion have incorporated tools such as Braille adaptation (1.75%), audio systems (0.25%), or text visualization tools (0.25%). This reflects a significant challenge in adapting tourism information to ensure inclusive experiences for all visitors.



Chart 7. The establishment has accessible spaces for people with disabilities



On the other hand, the measurement also analyzed the integration of sociocultural practices within tourism businesses. In this regard, 73.07% of service providers consider sociocultural sustainability to be of high importance (rating between 9 and 10), demonstrating a significant recognition of the relevance of this component within business management.

Likewise, several companies report implementing actions aimed at the preservation and promotion of local culture. Among the main initiatives identified are educating residents and visitors about cultural differences (58.1%), supporting or sponsoring cultural events in the destination (34.16%), and informing residents and tourists about risks and care of historical sites (30.67%). These actions reflect the interest of the tourism sector in contributing to the preservation of cultural heritage and the strengthening of local identity.

Therefore, the results show that the tourism sector of the destination has begun to incorporate practices related to accessibility, inclusion, and sociocultural sustainability. However, important opportunities remain to expand infrastructure adaptation, improve information accessibility, and strengthen actions aimed at ensuring more inclusive tourism experiences for all visitors.

Tourism Demand Performance

During 2025, Santiago de Cali recorded a total of 2,348,166 visitors, confirming the destination’s 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 approximately 54.24% of total visitors (1,273,675), followed by intra-departmental tourism with 32.97% (774,227 visitors) and international tourism with 12.79% (300,264 visitors). This composition reflects a relatively stable demand structure, where the national market continues to be the main driver of tourist flows to the city.

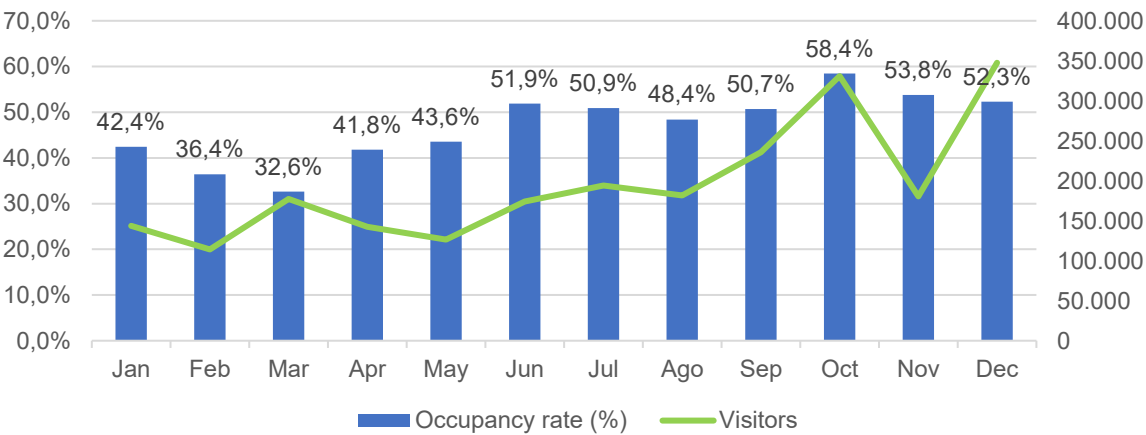
The monthly distribution of tourist flows throughout the year shows a marked seasonality pattern, with moderate levels during the first half of the year and a progressive acceleration in the second half. The initial months show lower volumes, with 114,114 visitors in February and 126,506 in May, while from June onwards a gradual recovery in tourist flow is observed.



The highest levels of visitors are recorded in October (330,743) and especially in December (347,509 visitors), once again consolidating the last quarter of the year as the most dynamic period for tourism in the destination.

Regarding hotel occupancy, the annual average stood at 46.72%, slightly lower than the level recorded in 2024 (48.36%), suggesting a stable market performance, although with a slight moderation in the use of hotel capacity. As in previous years, the lowest occupancy levels are concentrated in the first quarter, with 42.42% in January, 36.44% in February, and 32.60% in March. Subsequently, occupancy shows a sustained recovery from April onwards, reaching its peak in October (58.44%) and maintaining high levels during November and December.

Chart 8. Hotel occupancy and number of visitors



Tourism expenditure also shows a growing trend toward the end of the year. The estimated average expenditure per visitor is around \$1,530,030, with noticeable increases during the second half of the year. In terms of total monthly expenditure, the highest values are once again recorded in the last quarter of the year, with November reaching approximately \$2,398,047 and December around \$2,749,777. This confirms that the end-of-year season not only concentrates a higher volume of visitors, but also a greater capacity for tourism-related spending.

The indicators of tourist flows, hotel occupancy, and expenditure show that Cali maintains a solid tourism demand and a clearly defined seasonality, where the second half of the year concentrates the highest levels of tourism activity. This pattern confirms the importance of cultural events, holiday seasons, and year-end festivities as key drivers of tourism in the city. At the same time, these results suggest the need to continue developing strategies aimed at diversifying the tourism offer and distributing visitor flows more evenly throughout the year, in order to strengthen the economic stability of the sector.



Conclusions

The results of the tourism sustainability monitoring carried out in Santiago de Cali during 2025 provide a comprehensive overview of tourism performance in the destination, considering both its economic dynamics and its social, environmental, and business impacts.

First, the analysis of tourism demand confirms that Cali maintains a relevant position as an urban destination in southwestern Colombia. During 2025, a total of 2,348,166 visitors were recorded, with a market structure dominated by national tourism (54.24%), followed by intra-departmental tourism (32.97%) and international tourism (12.79%). Although the total number of visitors was lower than in 2024, hotel occupancy and tourism expenditure indicators show that tourism activity remains stable and continues to generate significant economic value for the destination.

Second, the analysis of the indicators reveals a marked seasonality pattern, with lower levels of activity during the first half of the year and a progressive recovery toward the second half. The highest levels of tourist flows, hotel occupancy, and expenditure are once again concentrated in the last quarter of the year, particularly in months associated with cultural events and holiday seasons, confirming the importance of the destination's cultural and festive calendar in driving tourism dynamics.

From a social perspective, the results of the residents' perception survey show a highly favorable attitude toward tourism. The vast majority of residents express a positive perception of visitor arrivals and recognize tourism as a driver of economic development for the city. However, perceptions of stability in several economic benefits associated with tourism are also identified, suggesting that, although tourism is valued positively, its impacts are perceived as gradual, with room for a broader distribution of benefits within the local community.

In environmental terms, residents maintain a predominantly positive perception of the relationship between tourism and the environment, although they identify potential risks related to waste management, pollution, and tourism infrastructure development in sensitive areas. This highlights the importance of continuing to strengthen sustainable tourism and environmental management strategies within the destination.

Furthermore, the results from tourism service providers show progress in the adoption of basic sustainability practices, particularly in waste management and the implementation of the 3Rs (reduce, reuse, recycle). However, important challenges remain in areas such as environmental impact measurement, water efficiency, and the adoption of renewable energy, which represent key opportunities to strengthen the environmental sustainability of the tourism sector.

Additionally, the analysis of business-related indicators shows that a significant proportion of tourism establishments have begun to incorporate elements of social responsibility and sociocultural sustainability, including actions aimed at promoting cultural heritage, educating



about cultural diversity, and integrating inclusive practices. Nevertheless, there are still opportunities to strengthen universal accessibility in the tourism sector, particularly in terms of adapting infrastructure, services, and information for people with different types of disabilities.

Overall, the results of the report show that tourism in Santiago de Cali continues to consolidate itself as a relevant economic activity for the territory, with high levels of social acceptance and progressive advances in the adoption of sustainability practices. At the same time, the analysis highlights the need to continue strengthening environmental management, business innovation, tourism accessibility, and demand diversification, in order to ensure a balanced, competitive, and sustainable tourism development in the long term.

Recommendations for the Destination

1. Diversify tourism seasonality: Promote events, cultural experiences, and tourism products during low-demand months to balance visitor flows throughout the year.
2. Strengthen the destination's international positioning: Continue promoting international visibility and improving air connectivity to increase the share of international tourism in the destination.
3. Expand the distribution of tourism benefits: Encourage the participation of local communities and small businesses in the tourism value chain to enhance the economic impact of the sector within the territory.
4. Promote environmental sustainability among businesses: Support training and assistance programs that encourage waste management, efficient water use, and the adoption of renewable energy among tourism service providers.
5. Strengthen tourism accessibility: Promote the adaptation of infrastructure, services, and tourism information to ensure more inclusive experiences for people with disabilities.
6. Consolidate tourism intelligence in the destination: Continue strengthening the tourism information system and the use of data to support planning and decision-making in the sector.

Achievements in 2025

During 2025, the Cali Tourism Observatory – SITUR Valle del Cauca consolidated a stage of institutional strengthening, analytical expansion, and technological integration, reaffirming its role as a strategic tourism intelligence infrastructure for the territory.

One of the main achievements of the year was the effective incorporation of specialized tourism intelligence through the use of Mabrian data, which allowed traditional statistical measurements to be complemented with analyses of digital reputation, source markets, air connectivity, and global demand trends. This integration materialized in the publication of a



dynamic dashboard for sector stakeholders, facilitating access to strategic information and promoting evidence-based decision-making.

In terms of institutional sustainability, a key milestone was the approval and implementation of a project with the National Tourism Fund of Colombia (FONTUR), aimed at ensuring the continuity of the observatory and strengthening its technical and analytical capacities. Additionally, the system received institutional support from the Tourism Secretariats of the Valle del Cauca department and the District of Santiago de Cali, ensuring the operational and methodological continuity of the system.

A significant milestone of the year was the launch of SiturLab, the tourism innovation laboratory of Valle del Cauca, conceived as a space for collaboration between academia, the productive sector, and the information system. Through this strategy, visits and working sessions were conducted with universities, promoting applied research, the development of scientific articles, and the strategic use of tourism data in academic projects.

At the international level, SITUR Valle maintained its participation in the International Network of Sustainable Tourism Observatories (INSTO) of UN Tourism, presenting methodological advances and measurement results, thereby strengthening the destination's positioning within the global network of observatories committed to international sustainability standards.

Overall, 2025 represents a transition toward a more advanced tourism analytics model, characterized by the integration of digital intelligence, academic strengthening, and greater institutional stability, laying the foundation for a new phase of strategic consolidation of the system.

Sustainability Challenges – Cali Tourism Observatory (SITUR Valle)

The institutional framework, background, and evolution of SITUR Valle have been extensively described in previous reports. For 2025, although significant progress was achieved in sustainability and technical strengthening, structural challenges remain related to financial stability and the consolidation of a permanent funding model for the system in 2026.

The main challenge continues to be ensuring stable, long-term funding that allows for maintaining the periodicity, depth, and technical quality of statistical measurements, as well as the continuous incorporation of new data sources and specialized tourism intelligence. The experience of previous years has demonstrated the vulnerability of regional information systems to changes in national funding schemes.

Although institutional support and strategic projects were secured during 2025, the key challenge lies in consolidating a structural financial model that reduces dependence on annual funding calls and enables multi-year planning of the system.



Additionally, the system's growth in terms of analytical tools, new data sources, and academic articulation implies the need to continuously strengthen technical capacities, platform interoperability, and methodological updates in line with international standards.

Another strategic challenge is to deepen the use and appropriation of data by tourism stakeholders, ensuring that the information generated is not only accessed but effectively used in planning, investment, and public policy design processes.

Despite these challenges, SITUR Valle continues to consolidate itself as the official source of tourism information in the department, prioritized within regional public policy and aligned with international measurement standards, reinforcing its strategic relevance for the sustainable tourism development of the territory.

Objectives for 2026

1. Consolidation of the Tourism Measurement System: Maintain and strengthen the continuous measurement of tourism indicators in Valle del Cauca, ensuring the continuity of monthly measurements of inbound tourism, tourism supply, sector employment, and visitor flows. This objective seeks to guarantee the updating, reliability, and comparability of tourism data, consolidating the observatory as the official data source for planning and decision-making in both the public and private sectors.

Additionally, efforts will continue to expand the coverage and representativeness of measurements, increasing the participation of tourism service providers and tourists in data collection processes to improve the accuracy and scope of sector indicators.

2. Strengthening Tourism Intelligence and Data Analytics: Continue strengthening the system's analytical capabilities through the integration of new data sources, tourism intelligence tools, and visualization systems, enabling a deeper understanding of visitor behavior, tourism supply dynamics, and market trends.

Within this framework, efforts will focus on expanding the use and consultation of analytical dashboards and strategic reports, facilitating access to information for public, private, and academic stakeholders, and promoting a culture of evidence-based decision-making.

3. Knowledge Generation and Tourism Innovation: Consolidate the SiturLab tourism innovation laboratory as a platform for collaboration between academia, the public sector, and the private sector, promoting applied research, the development of scientific articles, and the strategic use of tourism data in academic projects.

Through this initiative, the goal is to foster knowledge generation on regional tourism, promote interdisciplinary projects, and encourage innovative solutions that contribute to the sustainable development of tourism in Valle del Cauca.

4. Governance, International Cooperation, and Institutional Sustainability: Strengthen the observatory's institutional articulation with tourism ecosystem stakeholders, including



universities, research centers, business associations, and public entities, in order to consolidate a collaborative and sustainable tourism information system.

Likewise, efforts will be made to reinforce SITUR Valle's participation in the International Network of Sustainable Tourism Observatories (INSTO) of UN Tourism, strengthening the exchange of methodologies, experiences, and best practices in sustainable tourism measurement.

Finally, the observatory will continue to manage resources and strategic partnerships to ensure its financial, operational, and technological sustainability, guaranteeing the continuity of measurements and the strengthening of its analytical capacities in the long term.