

Delta Value of Tourism Study





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Prepared for
Delta Chamber of
Commerce

Prepared by
Lions Gate
Consulting

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Tourism Delta respectfully acknowledges the traditional territory of the scəw' aθən məsteyəx^w (Tsawwassen) and x^wməθk^wəy'əm (Musqueam) First Nations and of all the hən'q'əmin'əm' speaking people who have been stewards of this land since time immemorial.

Table of Contents

1	Introduction	1
1.1	Background.....	1
1.2	Purpose	1
1.3	Methodology	1
2	Delta and its Communities.....	3
2.1	Communities	3
2.2	Major Attractions	5
2.3	Transportation Services	5
3	Delta’s Tourism Industry.....	6
3.1	Overview.....	6
3.2	Accommodations	7
3.3	Other Tourism Operations	7
3.4	Visitor Services.....	8
4	Visitor Markets	9
4.1	Vancouver Coast & Mountains.....	9
4.2	Delta	10
5	The Impacts of Tourism in Delta	11
6	Other Benefits of Tourism	14
7	Conclusions	15

1 Introduction

1.1 Background

Tourism Delta is the official tourism organization for Delta, BC and operates as an integral part of the Delta Chamber of Commerce. It promotes the city's unique blend of natural beauty, outdoor recreation, and distinctive communities: Ladner, Tsawwassen, and North Delta.

In early 2023, the City of Delta approved a plan to bring Tourism Delta under the Chamber's umbrella, consolidating tourism promotion and business advocacy efforts within a single organization. Both entities share the same location where the Delta Chamber of Commerce also houses the official Delta Visitor Centre. This centre provides visitors with information on local attractions, accommodations, dining options, and events.

1.2 Purpose

Tourism Delta and the Delta Chamber of Commerce have commissioned this Delta Value of Tourism study. Its purpose is to describe how tourism contributes to the local economy by quantifying how much money tourists spend and where, the number of jobs and labour income supported by tourism, and tax payments to government.

The study is intended to help Delta Tourism and its partners make informed decisions about investment, marketing, and infrastructure, advocate for public and private sector involvement in tourism initiatives, attract grant funding and measure progress over time.

1.3 Methodology

The approach to quantifying the impacts of tourism on Delta is described following:

1. Geographic scope is the City of Delta, which excludes Tsawwassen First Nations land, including Tsawwassen Mills.
2. The baseline year for evaluation is 2024.
3. Estimates of overnight visitor volumes were derived from two sources:
 - a. Delta's hotel room inventory, occupancies and room revenues were verified with operator interviews and the data checked against average daily rates (ADR), occupancies and revenue per available room (RevPar) for Vancouver South Area/Surrey as published by Destination BC.
 - b. The short-term vacation rental inventory, occupancies, RevPar and average annual property revenue was obtained from the AirDNA profile for Delta.

- c. Overnight stays attributed to other sources such as RV parks and campgrounds, were not estimated because their levels are understood to be negligible and within the margin of error of the impact estimates.
4. Overnight stays were used to estimate the number of visitors who were either staying with friends and relatives or visiting just for the day (i.e., without staying overnight), based on the visitor profile for Vancouver Coast & Mountains tourism region and Statistics Canada's National Tourism Survey.
5. Visitor expenditures other than accommodation were estimated then allocated to tourism industries again in accordance with the Vancouver Coast & Mountains visitor profile.
6. After adjustments for front-end taxes, direct expenditures were then input to Statistics Canada's input-output model for British Columbia to generate estimates of the indirect, induced and total impacts for output, Gross Domestic Product (GDP), jobs, labour income and taxes. Direct impacts are the expenditures estimated above, in other words spending by tourists on hotels, restaurants, attractions, transportation, etc. The indirect impact is business-to-business spending by tourism-related businesses, while the induced impact is spending by workers in the tourism industry as a result of their wages.

Primary research in support of this study included key informant interviews, while secondary research was accessed from Destination BC, Destination Canada, Statistics Canada and Symphony Tourism Services. All references are cited as footnotes.

In association with this impact study, Tourism Delta also commissioned (under separate cover) a market analysis of Delta visitors using Environics Analytics' MobileScapes platform. It is a mobile movement analytics program that combines anonymized, consent-based location data from mobile apps and cellular networks to quantify visitor volumes and origin for a specific period, in this case 2024. Data are not used to determine impacts as they do not distinguish between overnight and day visitors, exclude international travellers and represent only a sample of visitors in the geofenced areas.

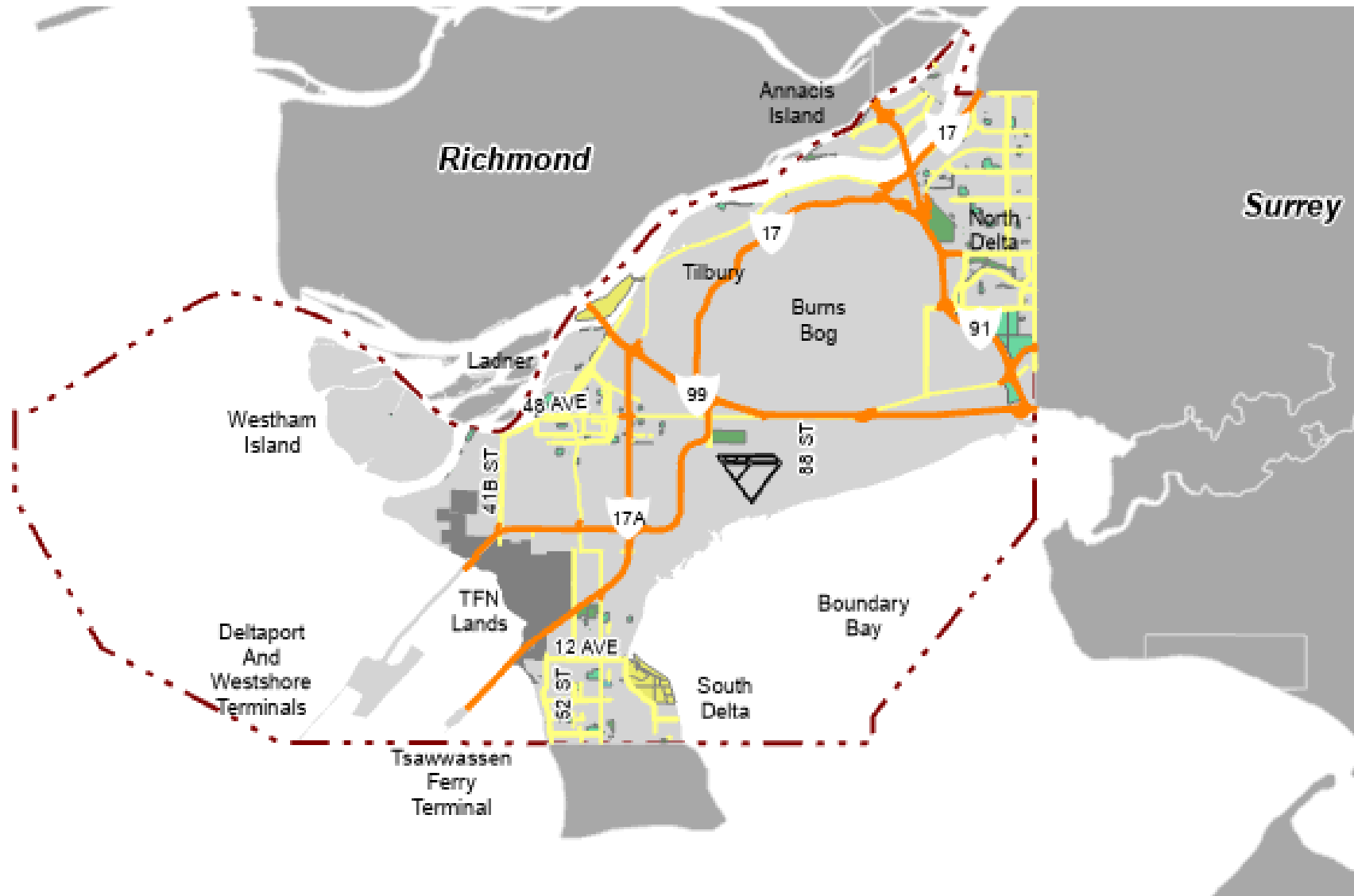


2 Delta and its Communities

2.1 Communities

- **Ladner**, situated along the banks of the Fraser River, was established in 1868 by brothers Thomas and William Ladner as a fishing and farming village. The area, once known as Ladner's Landing, developed into a hub for agriculture and the salmon canning industry, with its growth further supported by the construction of the Government Wharf in 1873. Today, Ladner maintains its small-town appeal with Ladner Village characterized by heritage buildings, tree-lined streets, and a variety of local shops and cafes. The village hosts the popular Ladner Village Market every other Sunday during the summer months, attracting visitors with fresh produce, handmade crafts, and live entertainment. Ladner is also home to several parks and recreational facilities, including the Ladner Leisure Centre. The community's proximity to natural attractions like Westham Island, known for its bird sanctuary and organic farms, adds to its appeal for nature enthusiasts.
- **Tsawwassen** occupies the southwestern corner of Delta, with scenic coastal views and access to beaches and parks. The community lies just north of the Canada–U.S. border, with the exclave of Point Roberts, Washington, accessible via 56th Street. Tsawwassen is also home to the Tsawwassen Ferry Terminal, a key hub for BC Ferries, connecting the mainland to Vancouver Island and the southern Gulf Islands. It is primarily a residential area but also has numerous parks and recreational facilities, including Boundary Bay Regional Park, Diefenbaker Park, and Winskill Park, which provide opportunities for outdoor activities like walking, cycling, and birdwatching. Tsawwassen is well-connected via Highway 17, providing access to the Tsawwassen Ferry Terminal and linking to other parts of Metro Vancouver.
- **North Delta** comprises the northeastern part of the municipality. As the most populous of Delta's three communities it is characterized by a suburban landscape interspersed with significant green spaces, including the expansive Burns Bog, one of North America's largest undeveloped urban land masses. Recreation facilities include Sungod Recreation Centre, Watershed Park, known for its walking and biking trails, and the Delta Nature Reserve, which provides access to parts of Burns Bog. There are several neighborhoods, including Annieville, Sunshine Hills, Sunshine Woods, Scottsdale, Nordel, and Canterbury Heights that offer a range of retail, dining, and service options.

Figure 1 City of Delta Municipal Boundary and Key Features



Source: City of Delta

2.2 Major Attractions

- **George C. Reifel Migratory Bird Sanctuary**, 300 hectares on Westham Island, hosting over 250 bird species and serving as a critical stopover on the Pacific Flyway.
- **Burns Bog**, North America's largest undeveloped urban landmass, 3,500-hectare peat bog with unique ecosystems accessible via the Delta Nature Reserve's boardwalk trails.
- **Boundary Bay Regional Park**, featuring Centennial Beach, noted for birdwatching, beachcombing, and sightseeing.
- **Watershed Park**, Delta's largest park with extensive hiking and biking trails.
- **Deas Island Regional Park**, historical and natural features, heritage buildings, popular for birdwatching and picnics.
- **Ladner Village Market**, one of the largest open-air markets in Western Canada.
- **Tsawwassen Mills**, located on Tsawwassen First Nation land, this large destination outlet mall with over 200 stores, restaurants, and family entertainment is adjacent to the municipality.
- **Delta Museum & Archives Society**, housed in a heritage building and surrounded by historic sites in Ladner Village, offers insights into the settler and Indigenous history of the area.
- **Tour de Delta**, a popular international cycling race held in North Delta, Ladner, and Tsawwassen.
- **Cascades Casino Delta**, gaming and dining experiences.
- **Emma Lea Farms**, a family-owned and operated farm located on Westham Island established in 1885, renowned for its u-pick and pre-picked berries.
- **Westham Island Herb Farm**, offering fresh produce, artisanal products and seasonal events, known for sustainable agriculture and community engagement.
- **Genesis Theatre**, a performing arts venue that is a cultural hub and host of concerts, theatrical productions, dance performances, lectures, and community gatherings.

2.3 Transportation Services

Delta is strategically positioned with several major highways facilitating the movement of people and goods:

- **Highway 99**: Connects Richmond to Delta via the George Massey Tunnel, serving as a primary route for traffic between Vancouver and the U.S. border.
- **Highway 91**: Links North Delta to New Westminster and Richmond, featuring the Alex Fraser Bridge—a vital crossing over the Fraser River.

- **Highway 17** (South Fraser Perimeter Road): Provides an east-west corridor connecting the Tsawwassen ferry terminal to major trade routes, enhancing freight movement efficiency.
- **Highway 17A**: Serves as an alternative route paralleling Highway 17, offering additional connectivity within the region.

Public transportation is primarily provided by TransLink, offering bus services that connect residents to neighboring municipalities. While Delta does not have its own SkyTrain stations, nearby stations in Surrey and Richmond are accessible via bus routes.

The Tsawwassen Ferry Terminal is a major gateway connecting the Lower Mainland to Vancouver Island and the Southern Gulf Islands. As the largest ferry terminal in North America, it handles millions of passengers annually and is integral to both passenger travel and freight transport.

Boundary Bay Airport, located in Delta, is Canada's seventh busiest airport by aircraft movements. It primarily serves general aviation, flight training, and air charter services, contributing to the region's aviation needs. Vancouver International Airport is located in neighbouring Richmond.

3 Delta's Tourism Industry

3.1 Overview

Delta's census population in 2021 was 108,455 (Table 1). BC Stats estimates an intercensal population of 125,165 in 2024, an 11% increase over 2021.¹ Delta is the seventh-largest of Metro Vancouver's 21 municipalities.

Tourism represents an important part of the Delta economy. Tourism employment was 5,865 in 2021, representing approximately 11% of all jobs in the community. The industry is an important source of employment for Indigenous and immigrant populations. There were 924 tourism businesses in 2023, 20% of all business in Delta.

Destination Canada considers Delta as having a medium tourism prevalence level which refers to how significant tourism is in proportion or comparison to other sectors. It is a measure of tourism's relative presence or impact on Delta.

Table 1 Population, Employment and Business Data, City of Delta

¹ BC Stats. 2025. British Columbia Regional District and Municipal Population Estimates. BC Stats' estimates adjust for census undercounts resulting in a 2021 Delta baseline population of 113,091.

Population (2021)	Population Growth (2016 vs. 2021)	Total Tourism Employment (2021)	Tourism Share of Employment (2021)
108,455	6.1%	5,865	10.9%
Tourism Businesses (2023)	Tourism Share of All Businesses (2023)	Indigenous Share of Employment (2021)	Immigrant Share of Employment (2021)
924	20%	3.1%	33.7%

Sources: Statistics Canada. 2023. Census Profile. 2021 Census. Statistics Canada Catalogue no. 98-316-X2021001. Ottawa. Released February 8 2023. (population, employment)
 Statistics Canada. 2024. Business Locations by Census Metropolitan Area (CMA) and Census Agglomeration (CA). (businesses)

3.2 Accommodations

Delta has a modest hotel inventory but a significant stock of short-term rentals that contribute to the local visitor economy through overnight stays. An estimate of room inventory is provided in Table 2.

Table 2 Delta Hotel and Short-term Rental Room Inventory and Performance, 2024

	Rooms	ADR	Occupancy	RevPar	Revenue
Hotels	229	\$216.28	84.0%	\$181.52	\$15,172,134
Short-term Rentals	552	\$133.90	49.0%	\$65.30	\$4,968,000
Total	781				\$20,140,134

Source: STR. 2025. Hotel Destination Report.

Air DNA. 2025. Delta. https://www.airdna.co/vacation-rental-data/app/ca/british-columbia/delta/overview?utm_source=chatgpt.com

Notes: ADR Average Daily Revenue, RevPar Revenue Per Available Room

Many STRs have a limited operating year, so Revenue estimates cannot be derived as a product of RevPar, Rooms and days annually.

3.3 Other Tourism Operations

There are over 150 food establishments in Delta, including restaurants, cafes, catering services, and food processing facilities.² Delta is also home to two wineries, a meadery, a craft distillery and three breweries. Food and beverage, along with accommodation, underpin and enable the visitor economy by offering visitors a direct way to experience local culture, traditions, and flavours. A strong food scene encourages longer stays and

² https://www.healthspace.ca/clients/fha/FHA_Website.nsf/Food-List-ByName?OpenView=&RestrictToCategory=858B1DA02DF82A54F54B4520F2C56654&count=30&start=120&utm_source=chatgpt.com

higher spending on food, drinks, and related experiences (e.g., wine tours, cooking classes). In Delta, food and beverage businesses support local farmers, fishers, and producers, creating a ripple effect in the regional economy.

Delta boasts a vibrant arts, entertainment, and recreation scene that caters to a wide range of interests. In addition to Genesis Theatre there are arts centres in North Delta and Tsawwassen. Recreation facilities include the Sungod Recreation Centre, Ladner Leisure Centre and Planet Ice Delta. These venues cater to visitors as well as residents and therefore contribute to the visitor economy.

Tourism Delta promotes various self-guided experiences that allow visitors to explore the region's natural beauty, local businesses, and cultural sites:

- Farm Hops: itineraries for local farms in areas like Westham Island, North Delta, Ladner, and Tsawwassen.
- Delta Ale Trail: local breweries and craft beer tastings.
- Sweet Treat Trail: desserts and confections from various local establishments.
- Delta Art Trail: galleries and public art installations throughout the city.
- Millennium Trail & Boundary Bay Dyke Trail: scenic walks and birdwatching.

3.4 Visitor Services

The Delta Visitor Information Centre (VIC) serves as the official hub for visitor information in Delta. It offers personalized tourism advice and trip planning assistance, travel guides, maps, and brochures, recommendations on local attractions, accommodations, dining, and events, information on outdoor activities such as cycling, birdwatching, and hiking and details on local festivals, markets, and cultural experiences. The VIC also tracks visitation which provides a snapshot of the seasonality of visitation in Delta, as seen in Figure 2.

Figure 2 Delta Visitor Information Centre Visitation Average Monthly Share, 2015-2024



Source: Destination BC. 2025. BC Visitor Services Statistics Program.

4 Visitor Markets

4.1 Vancouver Coast & Mountains

Delta is part of the Vancouver Coast & Mountains (VCM) tourism region, which includes Metro Vancouver, Fraser Valley and Sunshine Coast regional districts. As seen in Figure 3, most overnight visitors to VCM in 2023 were from BC, Alberta, and Ontario. BC residents contributed 33% of the total nights spent in the region. The top international markets were Washington and California. The data do not include day visitors.

Figure 3 Top Overnight Regional Markets in Vancouver Coast & Mountains Tourism Region, 2023



Source: Destination BC. 2025. Vancouver Coast & Mountains Regional Tourism Profile

Travellers in VCM have diverse origins. The average length of stay varies, with international travellers typically staying longer than domestic travellers. In 2023, the average trip length was 3.1 nights. In general, the more distant the visitor market the longer they will stay in the region. BC visitors stay on average 2.2 nights international visitors other than USA stay 9.3 nights. The most popular activities for travellers in VCM include visiting friends or family,

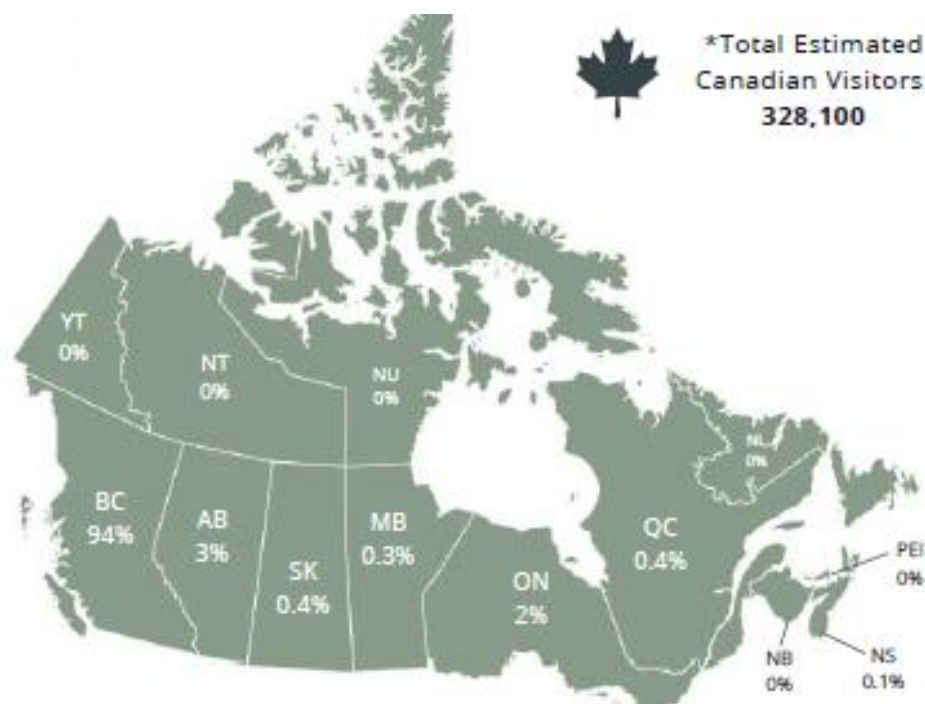
dining out, shopping, and sightseeing. For residents of BC, hiking or backpacking is also a favoured activity, while other Canadians frequently visit national or provincial parks.³

4.2 Delta

This section reviews the MobileScapes visitor profile commissioned under separate study by Tourism Delta. Readers interested in delving deeper into the market profile can refer to that report directly.

The domestic market profile for 2024 is shown in Figure 4. On average, 94% of visitors were from BC, 3% from Alberta and 2% from Ontario. This market profile differs from the VCM profile presented above because it excludes international visitors and day visitors. Given Delta's location in a large surrounding metro area, day visitation is a significant component of the visitor economy.

Figure 4 Delta's Domestic Visitor Markets by Province, 2024

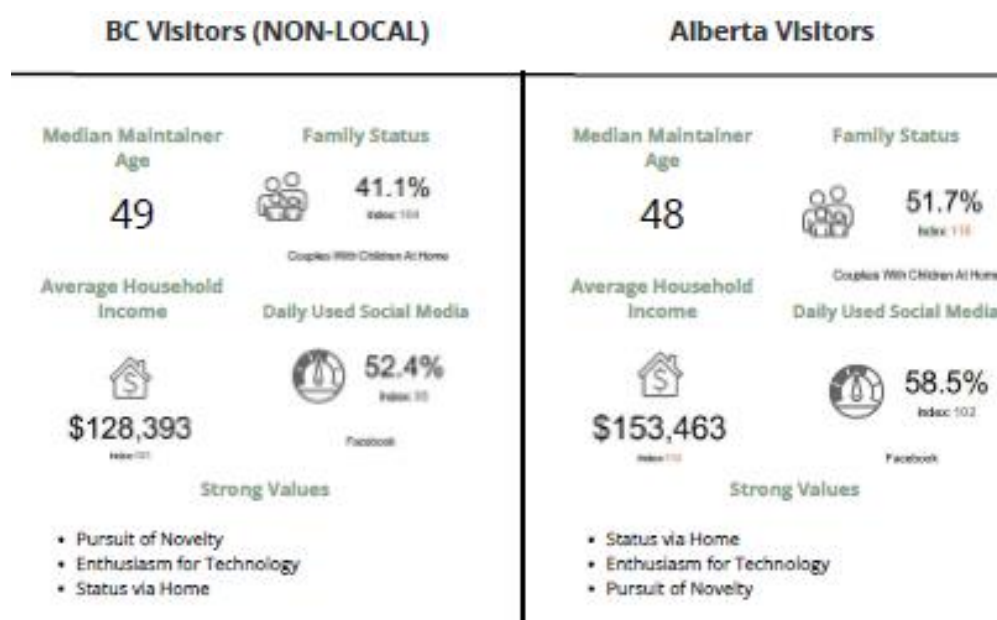


BC and Alberta visitor profiles are shown in Figure 5. The average BC visitor to Delta is 49 years of age, with a household income of \$128,000, a daily user of social media, without children at home.

³ Destination BC. 2025. Vancouver Coast & Mountains Regional Tourism Profile.

Alberta visitors to Delta are like BC visitors, however they have higher household incomes, and they are more likely than not to be couples with children at home.

Figure 5 Delta's Current BC and Alberta Visitor Profile, 2024



5 The Impacts of Tourism in Delta

The estimate of visitation and the associated direct expenditures by visitors to Delta in 2024 is shown in Table 3. Visitation is estimated at 778,000, comprising 281,000 overnight visits and 497,000 day visits. Overnight visits are made up of those staying in hotels and motels, short-term rentals (including B&Bs) and those visiting with friends and relatives.

The total spending is estimated at \$96.6 million in 2024, of which \$68.7 million (71%) was spent by overnight visitors and \$27.8 million (29%) by day visitors. When measured by spending, overnight visitors are a dominant market segment because of their multi-day stays and expenditures on accommodation.

Table 3 Estimate of Direct Expenditure in Delta by Visitor Source, 2024

Source	Volume	Expenditures
Overnight		
Hotels, Motels	68,000	\$ 42,145,000
Short-term Rentals	99,000	\$13,800,000
Visiting Friends and Relatives	114,000	\$12,773,000
Total Overnight	281,000	\$68,718,000
Day Visitors	497,000	\$27,839,000
Total Visitors	778,000	\$96,557,000

The allocation of direct expenditures by industry is based on the visitor profile for the Vancouver Coast & Mountains tourism region published by Destination BC⁴, with adjustments made for visitors not staying overnight and thus avoiding accommodation costs.⁵

Table 4 Allocation of Spending in Delta by Industry, 2024

Industry	Share	Expenditure
Accommodation	20.9%	\$20,140,000
Food and Beverage	39.6%	\$38,209,000
Retail	16.1%	\$15,522,000
Recreation and Entertainment	12.4%	\$11,940,000
Transportation	11.1%	\$10,746,000
Total		\$96,557,000

The estimate of total tourism impacts generated by visitors to Delta in 2024 appears in Table 5. These data show the combined direct, indirect and induced effects of direct expenditures on output, gross domestic product (GDP), labour income, jobs and tax revenues to government.

The total impacts on the province are as follows:

- \$167.1 million in output (the total value of all goods and services in 2024)
- \$89.6 million in GDP (the total value of all *final* goods and services in 2024)⁶
- \$58.0 in labour income (wages, salaries, employee benefits)
- Taxes of \$9.9 million (tax payments to all three levels of government)
- 1356 jobs (a headcount that is generally greater than full-time equivalent employment).⁷

⁴ Destination BC. 2025. Regional Tourism Profile Vancouver, Coast & Mountains.

⁵ Statistics Canada. 2024. National Travel Survey, first quarter 2024. As published in the Daily.

⁶ “final” refers to total value less purchase of intermediate goods and services, sometimes referred to as value added.

⁷ The Statistics Canada Input-Output (I/O) Model does not directly estimate Full-Time Equivalent (FTE) jobs. Instead, it estimates total jobs, which include full-time, part-time and seasonal positions. These are counted as headcounts, not adjusted for hours worked. So, for example, one part-time job and one full-time job both count as one job each in the I/O Model.

Table 5 Total Economic Impacts of Tourism in Delta, 2024

Impact Variable	Accommo- dation	Food & Beverage	Retail	Recreation & Entertain- ment	Transport- ation	Total
Direct Expenditure	\$20,140,134	\$38,208,695	\$15,522,282	\$11,940,217	\$10,746,196	\$96,557,524
Output	\$32,888,839	\$66,865,217	\$26,294,746	\$22,089,402	\$18,945,543	\$167,083,746
GDP	\$17,521,916	\$32,744,852	\$16,950,332	\$11,104,402	\$11,326,490	\$89,647,993
Labour Income	\$9,163,761	\$23,956,852	\$9,685,904	\$7,319,353	\$7,898,454	\$58,024,324
Gross Operating Surplus	\$9,284,602	\$9,743,217	\$6,891,893	\$3,438,783	\$4,083,554	\$33,442,049
Taxes	\$1,993,873	\$3,591,617	\$1,334,916	\$1,468,647	\$1,482,975	\$9,872,029
Jobs	204	650	230	160	112	1,356

Source: Statistics Canada. 2025. Table 36-10-0595-01 Input-output multipliers, provincial and territorial, detail level (for all variables other than Direct Expenditure).

Notes: Includes indirect and induced impacts

Industry classification-

Traveller accommodation [BS721100]

Food services and drinking places [BS722000]

General merchandise stores [BS452000]

Arts, entertainment and recreation [NP710000]

Other transit and ground passenger transportation and scenic and sightseeing transportation [BS48A000]

6 Other Benefits of Tourism

Tourism in Delta generates a wide range of socio-economic benefits for the community, contributing both directly and indirectly to its development. Benefits in addition to the impacts presented in the previous chapter include:

- **Cultural Preservation:** Tourism can encourage the preservation and promotion of local traditions, crafts, and heritage sites, fostering community pride. Historical and heritage sites like the Delta Museum and Archives, arts and cultural centres, natural and cultural landscapes (e.g., Reifel bird sanctuary) and festivals and events are all supported by visitors.
- **Community Development:** Revenues from tourism can be reinvested into social services, such as education, healthcare, and community centers.
- **Increased Cultural Exchange:** Interaction between locals and visitors promotes cross-cultural understanding and global awareness.
- **Empowerment of Marginalized Groups:** Tourism can create opportunities for women, youth, and Indigenous communities through inclusive policies and support for community-led enterprises. A significant portion of the tourism labour force in Delta is accounted for by Indigenous and immigrant workers.
- **Enhanced Public Infrastructure:** Tourism often leads to improvements in transportation, signage, public sanitation, and beautification efforts, enhancing quality of life. Examples in Delta include active transportation and cycling infrastructure (e.g., Barns to Beaches Bike Route), road and Intersection upgrades such as the Highway 91/17 Upgrade Project, park and recreation enhancements and Ladner Village revitalization.
- **Environmental Awareness:** Eco-tourism and responsible travel can promote conservation efforts and sustainable practices within the community. Tourism can be a powerful driver of environmental awareness in Delta through its ecologically significant areas like Burns Bog, the Fraser River estuary, and the Reifel Bird Sanctuary. Activities like wildlife watching and nature photography foster appreciation for natural areas and promote responsible behaviour. Tourism infrastructure like nature interpretation signage, recycling bins at parks, or eco-themed festivals doesn't just inform tourists, it educates locals too. These small investments gradually shape a community culture that values sustainability.
- **Community Branding:** Tourism can help build a positive image and brand for a community, increasing its appeal to investors, new residents, and other stakeholders. Examples include showcasing Delta's agricultural roots through agritourism and promoting Tsawwassen's beaches and ferry access as a gateway to adventure.

- **Civic Engagement and Identity:** Delta's role as a tourism destination can foster a sense of pride and engagement among residents who participate in shaping the visitor experience. In Delta, tourism supports civic engagement and identity by building community pride, creating participatory cultural experiences, encouraging inclusive storytelling, promoting local leadership in planning and development, and offering economic and expressive outlets for residents.

7 Conclusions

The major conclusions of this impact analysis are as follows:

- Tourism in Delta is a significant economic generator even though it is not a highly visible one due to the dispersed nature of visitor activities and spending.
- Tourism tends to be diffuse across the community in part because of the role played by short-term rentals which are scattered in residential neighbourhoods.
- In tourism, labour income represents 65% of GDP, which is significant because it means a major portion of the industry's value added is going into payroll and therefore into household incomes. That is a major factor in creating economic diversification and enhancing community stability.
- Visitor spending supplements local spending on local restaurants, shops, museums, festivals, guided tours, bike rentals and local farms that enhance quality of life in Delta.
- Tourism is on a growth trajectory and less exposed to the boom/bust cycles of the province's resource industries, the Covid 19 pandemic notwithstanding. In conjunction with the year-round nature of the visitor market, this brings opportunities for the local economy and further diversification potential moving forward.
- The benefits and positive impacts of tourism are not limited to the economy. Cultural life, environmental values, community infrastructure and civic identity are all enhanced and supported by tourism.

