

November 3, 2025

To: Tom Pier, Chair, California Boating and Waterways Commission

From: Maggie Hallahan and Hampus Idsater, Commissioners, California Boating and Waterways Commission, the Subcommittee on Boat Slips

Re: Initial Analysis of Boat Slips, Moorings, and Boat Amenities in California

Dear Chair Pier,

The Subcommittee on Boat Slips, as formed at our Commission meeting in May 2025, has met on three occasions over the past six months. In between these meetings, we have conducted extensive data collection and analysis. As a result of these efforts, we are now in a position to provide the Commission with an initial analysis of boat slips, moorings, and boat amenities in California.

Our key conclusions from the initial analysis are as follows:

1. There are a total of approximately 80,000 boat slips and moorings across the State of California.
2. The regions with the highest concentration of boat slips are the following:
 - a. Southern California (from Santa Barbara to San Diego): approximately 35,000 boat slips;
 - b. San Francisco Bay Area: approximately 25,000 boat slips;
 - c. Central Valley: approximately 10,000 boat slips;
 - d. Northern California (including Shasta, Humboldt, and Mendocino Counties, among others): approximately 5,000 boat slips; and
 - e. Central Coast: approximately 3,000 boat slips.
3. Approximately 22% of the total boat slips in California are smaller than 25 feet. However, these smaller slip sizes are generally characterized by a high vacancy factor. Structural vacancies appear to exist among smaller slips despite substantially lower slip rental rates on a per linear foot basis relative to larger slips.

4. By contrast, occupancy rates for slips in the size range of 45 feet or larger are generally very healthy despite higher pricing on a per linear foot basis.
5. Most coastal recreational harbors in California appear to have been constructed between 1963 and 1971. Several of the recreational marinas within these harbors are still in need of significant improvements to slips and amenities in order to serve today's boating communities.

Based on our findings, we have formulated the following hypotheses which we believe merit further analysis:

- I. Hypothesis #1: Boats have generally increased in size since California's original recreational boating infrastructure was built in the 1960s and early 1970s. This trend is partly a result of disposable income growth, but it also reflects advances in boat manufacturing and the reality of boating on the powerful Pacific Ocean where smaller boats are generally less well suited than larger boats. Consequently, many experienced recreational boaters have upgraded their boats over time. It is also worth noting that boats up to 30 feet in length can be stored on trailers. This helps explain why over 90% of the recreational boats in California are, in fact, stored on land rather than in harbors. For all these reasons, the smaller slips in California's recreational harbors are increasingly prone to structural vacancies;
- II. Hypothesis #2: Insufficient opportunities for more Californians to experience boating and become experienced boaters. This is a serious problem as the future of boating in California depends on the ability of boating to engage with a far larger and more diverse population than in the 1960s. The key will be to create pathways for Californians to become boaters regardless of their background or income levels; and
- III. Hypothesis #3: Policymakers and regulators appear to have been too focused on the preservation of smaller boat slips instead of promoting the types of activities and investments that truly create pathways to boating. Such critical activities and investments include the following:
 - a. Boating education, including boater safety instruction, affordable sailing schools, and aquatic centers;
 - b. Affordable entry points to boating, such as kayaking and stand-up paddleboarding;

- c. Awareness campaigns centered on the mental health benefits of boating and spending time on the water, especially in the digital age;
- d. Public boat launching facilities, including related safety measures such as life jacket loaner stations;
- e. Boat rentals and boat clubs; and
- f. Innovative technology applications with the potential to democratize boating, such as boat-sharing apps, many of which are developed in California.

As a next step, we recommend that our Subcommittee be tasked with verifying (or falsifying) these hypotheses and advising the Division of Boating and Waterways on what concrete actions can be taken in response to the issues identified.

Sincerely,

Commissioner Maggie Hallahan

Commissioner Hampus Idsater

California Boating and Waterways Commission, the Subcommittee on Boat Slips