

An Assessment of Bodega Bay's Marinas

Introduction

Bodega Bay, located along the scenic Sonoma County coastline, is home to three publicly owned marina facilities: Spud Point Marina, Mason's Marina, and the Sport Fishing Center. These marinas are vital components of the region's maritime infrastructure and serve a range of users including commercial fishers, recreational boaters, and tourists. In addition to providing direct services such as berthing and fueling, the marinas also function as community assets, offering public access to the waterfront and supporting the local hospitality industry.

These marinas are situated near one another within Bodega Harbor. Spud Point Marina and Mason's Marina are located on the west side of the harbor, while the Sport Fishing Center is positioned across the harbor to the East. Management of these facilities falls under the jurisdiction of Sonoma County, which has recently reabsorbed operational responsibilities for Mason's Marina after the conclusion of a third-party management agreement. Currently, Spud Point personnel assist in operating the Sport Fishing Center, although plans are underway to consolidate staff at Mason's Marina and explore leasing options for the Sport Fishing Center.

This report presents a comprehensive overview of the current state of the marinas, covering facility operations, financial performance, infrastructure conditions, and the evolving role of the marinas in the local economy and community.



Facility Utilization and Revenue Trends

The Bodega Bay marinas consistently operate at or near full berthing capacity. As of Fiscal Year (FY) 2024-2025, the average berthing occupancy rate across the three facilities stands at 98%. This figure reflects the strong demand for both long-term and transient berthing from commercial and recreational users.

Revenues are generated from a combination of berthing fees, fuel and ice sales, seafood offloading (wharfage), and various ancillary services such as trailer storage, laundry, shower use, and administrative fees. The income generated from these other ancillary services has declined since the beginning of FY 2022-2023. In Q3 FY 24-25, diesel and gas fuel revenue fell from \$300k to \$240k compared to the same quarter in FY 23-24, while ice sales declined from 97.8 tons to 81.8 tons, an annual revenue loss of \$1.5k.

Total combined operational revenue for all three marinas have remained relatively constant around \$3 million annually in the past 10 years, for an average annual net position, after service, supply, and capital expenditures of \$78k. However, it should be noted that each marina is tracked in a separate enterprise fund. While the combined average may show earnings, when broken into separate funds, expenditures have outpaced revenues at Spud Point Marina since FY 2022-23. Besides the revenue from operational streams, the Bodega Bay Marinas have relied on non-operating revenue from one-time sources, such as General Fund contributions from the Board of Supervisors for fee waivers and abandoned vessel abatement, insurance claim reimbursements, and contributions from the Regional Parks Foundation. The average annual non-operating revenue for the past 10 years is \$330,327, which partially offsets the overall costs and deficits.

Revenue trends are influenced by multiple external and internal factors. External pressures include fluctuations in fuel prices, changes in recreational boating activity, and environmental conditions affecting commercial fishing. Internally, deferred maintenance and aging infrastructure may limit the marinas' capacity to fully capitalize on available revenue streams.

Historically, the collective composition of the commercial and recreation boat fleets was 80% commercial, 20% recreation. Based on the dynamic changes in fisheries, the fleet now stands at 23% commercial and 77% recreational. The marinas were designed to incorporate different revenue streams dependent on the strength of the fishing season, including fuel and oil sales, ice sales, and wharfage, but none of these revenue streams exist today. For the Bodega Bay marinas to regain a sustainable revenue, Spud Point, Mason's Marina, and the Sport Fishing Center all need to incorporate additional revenue streams into their cash flow.

Commercial Fishing: Economic Role and Regulatory Impacts

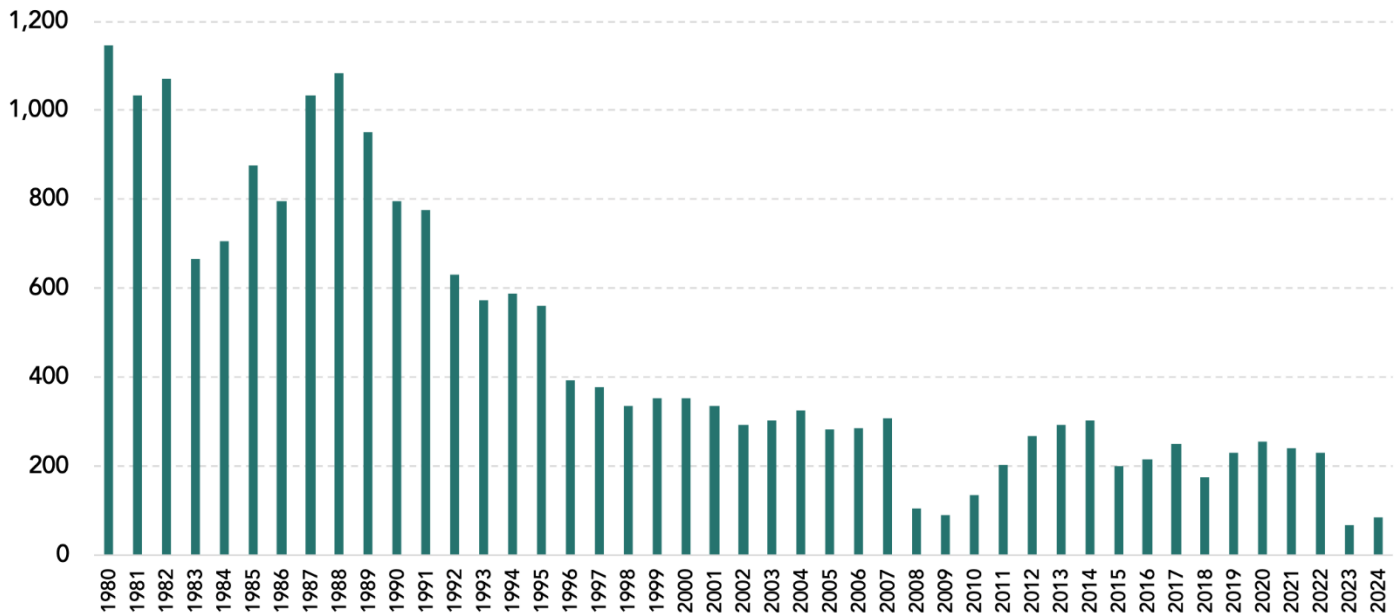
Historically, Bodega Bay has been a prominent hub for commercial fishing in Northern California. During the 1980s, the harbor supported over 1,000 commercial vessels. In recent decades, that number has declined significantly, with just 78 active commercial vessels currently operating from the harbor. The loss of fishing as a reliable industry has not only directly impacted jobs in the fishing industry, but also indirectly, through restaurants and retail.

This reduction is tied to multiple challenges:

- Environmental variability, including marine heatwaves and algal blooms
- State and federal regulations that have restricted or closed key fisheries such as Chinook salmon and Dungeness crab
- Shifts in consumer demand and global seafood markets: the price of salmon and crab has risen due to decreased supply, especially in California

Vessel participation through the Bodega Bay Port has dropped significantly, as the salmon, halibut, and tuna catches have all dropped significantly in recent years.

Total Commercial Vessel Participation (Bodega Bay Port Area), 1980 – 2024, number of vessels



Source: California Department of Fish and Wildlife Analysis: Bay Area Council Economic Institute

Number of landings (lbs.) in Bodega Bay per year



Source: CDFW Analysis: Bay Area Council Economic Institute

Value of landings (usd) in Bodega Bay per year



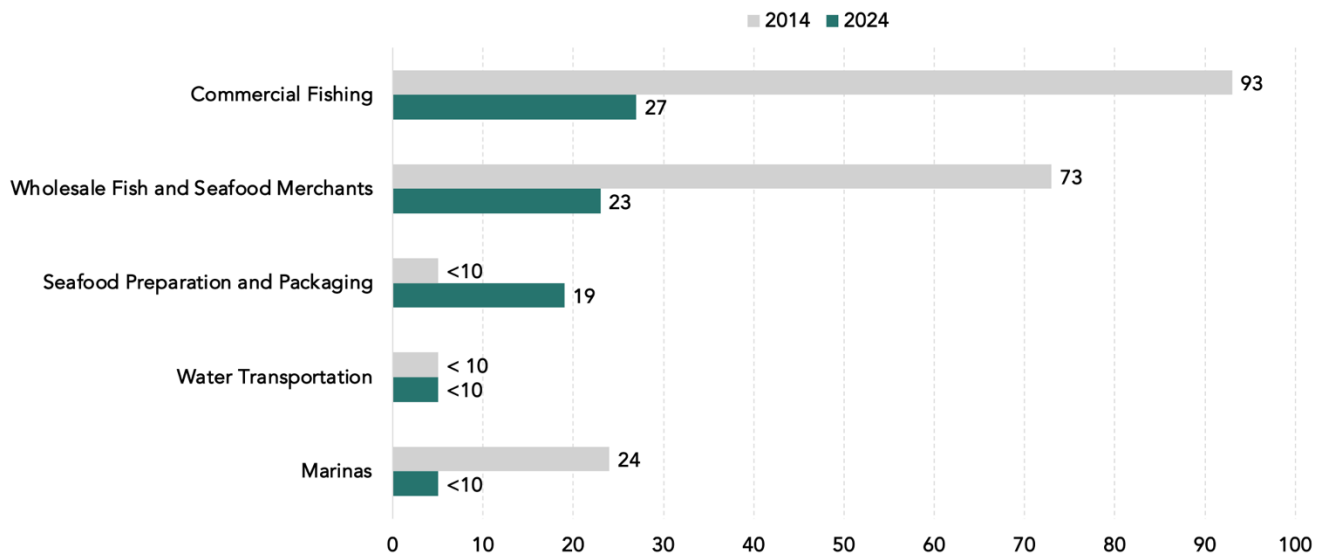
Source: CDFW Analysis: Bay Area Council Economic Institute

The fluctuation in landing values has largely been due to changes in the value of the catch. In the past five years alone, several regulations have halted the fishing of some of the most lucrative seafood in California. The king salmon fishery, once a mainstay of the local economy, has been closed for three consecutive seasons. Recreational salmon fishing has also been halted for two years. The Dungeness crab season, another economic pillar, has faced delayed openings and early closures due to entanglement risks for protected marine species, including humpback whales. The gross regional product of fishing industries in Sonoma County has declined from nearly \$39 million in 2014 to \$24 million in 2024, a -38% change.

As a result, many fishers have diversified their operations. Some have pivoted to marine tourism, offering whale-watching or sportfishing charters. Others have shifted focus to less regulated or emerging fisheries, such as rockfish or sablefish.

Payroll employment in commercial fishing – and the support services that enable it – has never been substantial and is also shrinking over the last decade

*Payroll employment by year in the Blue Economy (*data does not include sole proprietorships)*



Source: Lightcast, California EDD. Analysis: Bay Area Council Economic Institute Note: Data are not seasonally adjusted.

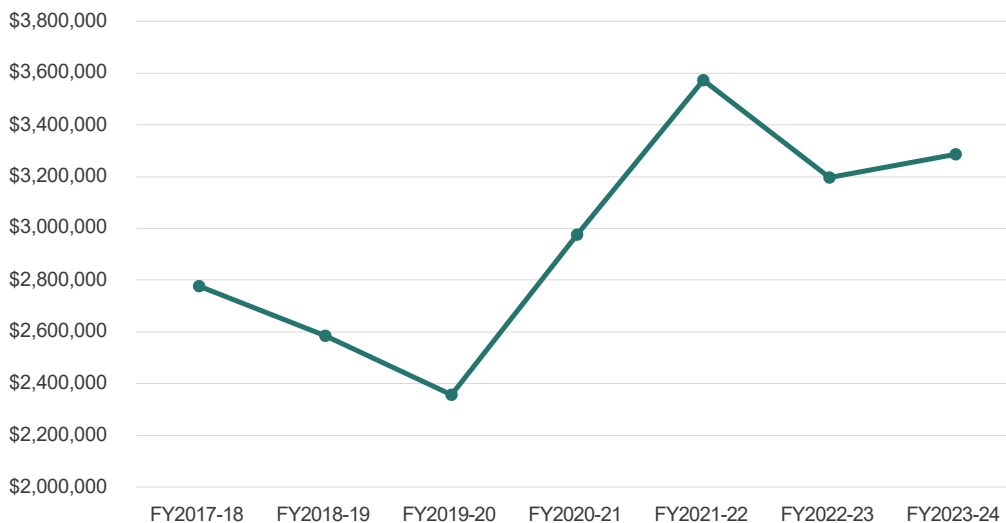
Tourism and Recreation Trends

Despite a long-term decline in the commercial fishing industry, Bodega Bay’s recreation and tourism sector has flourished, transforming the area into a thriving coastal destination. Recreational and sport fishing have surged in popularity, drawing anglers from across the region and beyond. While the Chinook salmon season has been closed to both commercial and recreational fishing the past two years, halibut, lingcod, and rockfish are all popular catches for recreational fishing. Additionally, non-fishing activities that utilize the coast are surging in popularity including hiking, wine-tasting, camping, and kayaking – all of which are bringing more tourists to the region.

As a result, hotels, vacation rentals, and campsites in Bodega Bay are consistently booked, especially during peak seasons, reflecting a strong visitor demand. In hotels, since the beginning of 2022, the number of rooms available in unincorporated Sonoma County, which includes Bodega Bay, has grown from 588 to 755, a nearly 30% increase. This sustained interest in the region demonstrates a proven track record of high return on investment for businesses and public projects that tap into Bodega Bay’s tourism potential.

A surge in TOT revenue demonstrates strong visitor demand in Bodega Bay accommodations

Transit Occupancy Tax for Bodega Bay (ZIP Code 94923) from FY2017-18 to FY2023-24



Source: County of Sonoma Auditor-Controller-Treasurer-Tax Collector Analysis; Bay Area Council Economic Institute

Transient Occupancy Tax (TOT) also known as “hotel tax” revenue for Bodega Bay (ZIP code 94923) shows resilient growth in recent years. Between FY 2017-18 and FY 2023-24, annual collections ranged from a low of about \$2.36 million in 2019-20 to a high of \$3.57 million in 2021-22. The significant decline in 2019-20 reflects the impact of the COVID-19 pandemic, but revenues rebounded strongly in 2020-21 and peaked the following year as domestic travel surged. Since then, collections have stabilized above \$3.1 million annually, indicating that visitor demand and lodging activity in Bodega Bay remain consistently strong compared to pre-pandemic levels. Overall, TOT revenue has grown by roughly 17% since 2017-18, underscoring Bodega Bay’s enduring appeal as a coastal destination and the important role tourism plays in the local economy.

Deferred Maintenance and Infrastructure Needs

The marinas in Bodega Bay are facing significant challenges due to years of deferred maintenance, with several key infrastructure elements in urgent need of attention. Top priority repairs total \$10.25 million, including major items such as the replacement of the icehouse at Spud Point Marina (\$3.2 million), replacement of rotten wood whalers at Spud Point (\$1.25 million), and full dock replacements at Mason's Marina (\$2.27 million) and the Sport Fishing Center (\$3.09 million). Second priority (B) repairs add another \$907,936, while longer-term repairs (C) total \$825,000, bringing the combined deferred maintenance needs across all three facilities to nearly \$12 million. Smaller, but still important, repairs include fixing rot in plywood dock box covers, replacing worn dock pile collars, and ensuring these components meet durability and safety standards.

All three marinas need significant repairs, with most repairs being high priority

Deferred maintenance cost of Spud Point Marina, Sport Fishing Center, and Mason's Marina by priority (A-C)

	Spud Point Marina	Sport Fishing Center	Mason's Marina	Total
Priority A	\$4,899,000	\$3,089,300	\$2,265,742	\$10,254,042
Priority B	\$609,936	\$298,000	-	\$907,936
Priority C	\$825,000	-	-	\$825,000
Total	\$6,333,936	\$3,387,300	\$2,265,742	\$11,986,978

Source: Sonoma County Note: Deferred maintenance numbers are projected estimates and have not been adjusted for inflation.

Beyond structural repairs, there is a pressing need to invest in critical equipment. The Travelift at Spud Point Marina, vital for fishermen and other boat owners to haul their vessels out of the water for repairs and maintenance, needs to be replaced to ensure continued service. Purchasing and renovating an adjacent boat yard property at Spud Point Marina would provide improved facilities for marine trades and vessel storage, bolstering the local maritime economy. Additionally, upgrading the fuel system to include an automated, self-pay with credit card option would modernize operations and improve convenience for users, particularly during off-hours.

Conclusion

Bodega Bay's marinas remain essential economic and community assets, providing critical support for commercial fishing, recreation, and tourism. While commercial fishing has faced sustained declines due to environmental and regulatory pressures, the region is transitioning to a more tourism and recreation-based economy. This pivot, however, must be matched with targeted investment in infrastructure and modernization to ensure the marinas can continue to meet evolving demands, maintain safety, and sustain their role in the local economy. Addressing deferred maintenance is not only a matter of preserving existing assets but also of unlocking the full economic potential of Bodega Bay's waterfront.

Key Takeaways

- High utilization but declining revenues: Berthing occupancy remains near 98%, but revenues have fallen due to fuel and ice sales declines and aging infrastructure.
- Shift from commercial to recreational focus: Commercial fishing has dropped from over 1,000 vessels in the 1980s to 78 today, but sport fishing, tourism, and hospitality have grown significantly.
- Tourism boom offers strong ROI potential: Visitor demand remains high, with hotels and campsites often fully booked.
- Critical infrastructure in need of investment: Almost \$12 million in deferred maintenance has been identified, including major repairs to docks, whalers, and the icehouse.
- Risk to long-term operations: Failure to address structural deficiencies, fire suppression gaps, and erosion may jeopardize operational permits and ADA compliance in the future.