



Vinifera Homes

Q2 2026 Sonoma Market Analysis

Who We Are



Harman Nagi

Head of Operations



Anish Patel

Head of Owner Relations

How We're Different



The short term game is not new to us.

Decades of experience running hotels, since well before AirBnB.



No intention to manage hundreds of properties, so we can continue to provide the **personalized attention our clients deserve.**



We're data nerds. We really enjoy digging into and tracking metrics to maximize performance.



We actually love what we do.

Sonoma Market Snapshot



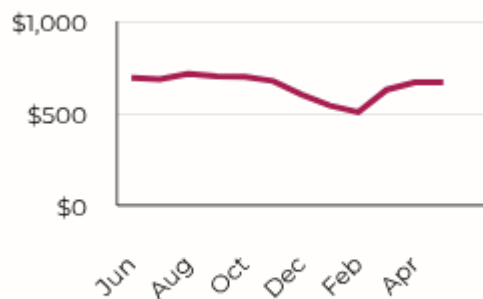
Demand Metrics



Revenue

Annual (YoY): \$105K(0%)

May'26 / May'25 : (+9%)



ADR

Annual (YoY): \$644(+1%)

May'26 / May'25 : (+6%)



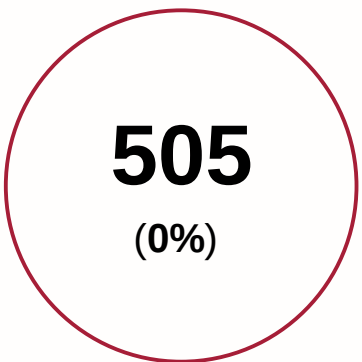
Occupancy

Annual (YoY): 51% (-1%)

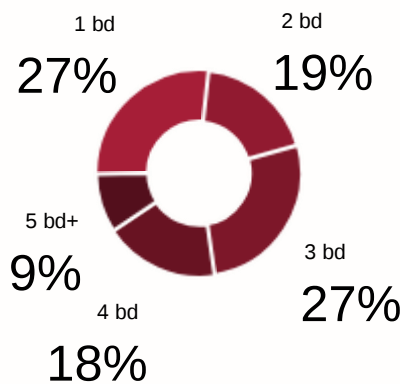
May'26 / May'25 : (+1%)

Supply Metrics

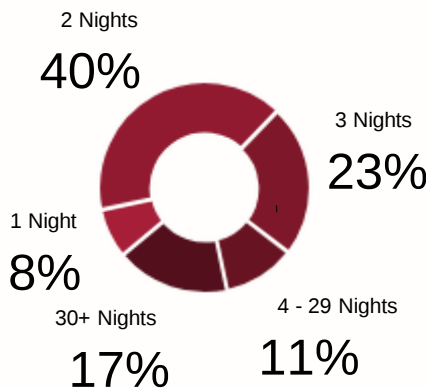
Active Listings



Listings by Bedroom



Listing by Min Stay



Competitive Analysis - 3 BRs that Sleep 6

Sonoma Comps (linked)	Revenue	ADR	Occ	Rating (#)*	# BRs	Sleeps	Pool	Hot Tub	Views	Arch. & Design	Photos & Listing
Comp 1	\$247,228	\$1,429	55%	4.95 (65)	3	6	✓	✓	★★★	★★	★★
Comp 2	\$241,008	\$1,275	58%	4.95 (165)	3	6	✓	✓	★★★	★★★	★★
Comp 3	\$222,897	\$1,218	55%	4.95 (105)	3	6	✓	✓	★★★	★	★★
Comp 4	\$202,869	\$763	75%	5 (140)	3	6	✗	✓	★★	★★	★★
Comp 5	\$174,800	\$647	79%	4.95 (538)	3	6	✓	✓	★	★★	★
Comp 6	\$169,503	\$1,324	61%	5 (47)	3	6	✓	✓	★	★	★★
Comp 7	\$158,905	\$631	83%	4.95 (149)	3	6	✗	✗	★★	★★	★★
Comp 8	\$120,929	\$858	45%	4.95 (48)	3	6	✓	✓	★	★★	★★
Comp 9	\$119,365	\$656	73%	5 (66)	3	6	✗	✗	★	★★	★★
Comp 10	\$119,127	\$827	64%	4.95 (42)	3	6	✓	✓	★	★★	★★
Comp 11	\$117,131	\$968	48%	5 (4)	3	6	✓	✓	★★★	★★	★★
Comp 12	\$114,049	\$821	45%	5 (357)	3	6	✗	✗	★★	★★	★★
Comp 13	\$110,072	\$895	38%	5 (101)	3	6	✓	✓	★★	★	★★
Comp 14	\$101,613	\$558	54%	4.95 (261)	3	6	✗	✓	★★★	★★	★★
Comp 15	\$101,342	\$897	38%	5 (27)	3	6	✓	✓	★★★	★★	★★
Comp 16	\$100,977	\$692	51%	5 (72)	3	6	✓	✓	★★★	★★	★

*Sample of properties in market, not comprehensive
Source: AirDNA

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*Ratings above 5.0 are VRBO ratings (on scale of 1 - 10)

Competitive Analysis - 4 BRs that Sleep 8

Sonoma Comps (linked)	Revenue	ADR	Occ	Rating (#)*	# BRs	Sleeps	Pool	Hot Tub	Views	Arch. & Design	Photos & Listing
Comp 1	\$208,517	\$1,629	39%	4.9 (32)	4	8	✓	✓	★★★	★★	★★
Comp 2	\$207,251	\$1,901	54%	5 (66)	4	8	✓	✓	★★★	★★★★	★★
Comp 3	\$189,581	\$1,335	41%	5 (30)	4	8	✓	✗	★★★	★	★★
Comp 4	\$182,908	\$1,648	34%	5 (221)	4	8	✓	✗	★★★	★★	★★
Comp 5	\$163,364	\$1,433	46%	4.95 (36)	4	8	✓	✓	★★	★★	★
Comp 6	\$152,031	\$1,600	37%	4.9 (200)	4	8	✓	✗	★★	★★	★★
Comp 7	\$140,923	\$1,258	58%	5 (33)	4	8	✓	✓	★★★	★★	★★
Comp 8	\$139,832	\$2,370	26%	5 (78)	4	8	✓	✓	★★★	★★	★★
Comp 9	\$136,474	\$1,083	56%	4.85 (282)	4	8	✓	✗	★★	★	★★
Comp 10	\$133,401	\$883	42%	5 (273)	4	8	✗	✓	★★	★★	★★
Comp 11	\$132,125	\$1,519	35%	4.95 (18)	4	8	✓	✗	★★★	★	★★
Comp 12	\$128,423	\$813	44%	4.95 (56)	4	8	✗	✓	★★	★★	★
Comp 13	\$126,937	\$976	45%	5 (338)	4	8	✗	✓	★★	★★	★★
Comp 14	\$120,753	\$1,139	33%	5 (40)	4	8	✓	✗	★★★	★★	★★
Comp 15	\$118,941	\$700	50%	4.75 (56)	4	8	✗	✓	★★	★	★
Comp 16	\$114,887	\$1,105	55%	5 (40)	4	8	✓	✓	★★★	★	★★

Competitive Analysis - 5 BRs that Sleep 10

Sonoma Comps (linked)	Revenue	ADR	Occ	Rating (#)*	# BRs	Sleeps	Pool	Hot Tub	Views	2Arch. & Design	Photos & Listing
Comp 1	\$443,837	\$1,865	66%	5 (16)	5	10	✓	✓	★★	★★	★★★★
Comp 2	\$419,456	\$1,907	66%	5 (78)	5	10	✓	✓	★★	★★	★★
Comp 3	\$352,336	\$2,123	47%	5 (75)	5	10	✓	✗	★★	★★	★★
Comp 4	\$278,942	\$1,348	58%	4.85 (139)	5	10	✓	✓	★★	★★★★	★★
Comp 5	\$275,610	\$1,681	51%	5 (32)	5	10	✓	✓	★★	★★	★★
Comp 6	\$273,842	\$1,165	69%	4.95 (382)	5	10	✓	✓	★	★★	★★
Comp 7	\$268,315	\$1,474	59%	5 (41)	5	10	✗	✓	★★	★★	★
Comp 8	\$246,478	\$2,181	35%	5 (90)	5	10	✓	✓	★★★★	★★★★	★★
Comp 9	\$237,907	\$1,451	56%	4.95 (35)	5	10	✗	✓	★★	★★	★★
Comp 10	\$234,255	\$1,952	37%	4.95 (107)	5	10	✓	✓	★	★★	★
Comp 11	\$152,040	\$2,083	24%	5 (82)	5	10	✓	✓	★★	★★	★★
Comp 12	\$128,999	\$2,389	20%	5 (6)	5	10	✓	✗	★★	★	★★
Comp 13	\$126,227	\$830	44%	4.95 (72)	5	10	✗	✓	★★	★★	★
Comp 14	\$115,506.00	\$861.99	38%	4.95 (76)	5	10	✗	✓	★★	★	★★
Comp 15	\$115,306.00	\$1,077.63	51%	5 (120)	5	10	✓	✓	★★	★	★★

Percentile Analysis of Sonoma City

Last 12 Month Vacation Rental Performance

Percentile	50th	60th	70th	80th	90th	95th
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Median Revenue	3 bed	\$86,153	\$98,008	\$110,274	\$133,891	\$173,211	\$197,661
	4 bed	\$126,849	\$133,093	\$164,365	\$208,264	\$259,356	\$300,747
	5 bed	\$243,836	\$272,874	\$299,871	\$351,583	\$408,347	\$447,288

vs. 50th percentile	3 bed	0%	14%	28%	55%	101%	129%
	4 bed	0%	5%	30%	64%	104%	137%
	5 bed	0%	12%	23%	44%	67%	83%

What does this data mean: Above we are showing properties that perform at various percentiles. A 50th percentile mean that 50% of properties perform worse and 50% of properties perform better. A 60th percentile means 60% of properties perform worst. Importantly, what the data also shows is that **properties managed well enough to be at the 95th percentile do more than twice as well as properties at the 50th percentile.**

How To Set Up Vacation Rentals For Success

Pick your target audience

1

Who are you trying to attract? i.e.: couples for a romantic getaway, small family travelers, adventure seekers, luxury travelers, wine enthusiasts, etc

Design and furnish the home

2

Work with a professional designer who is well-versed in vacation rentals to curate and amenitize the house to attract our target audience and stand out from the crowd

Lifestyle photos

3

Obtain high quality, professionally staged photos that set the scene and showcase the amazing guest experience for your target audience

Deliver an amazing guest experience

4

Build rapport with guests from the moment they book all the way through post-stay follow-up; provide personalized recommendations, guidebook, & quick responses to ensure they feel well taken care of

Build amazing reviews

5

Reviews increase our ranking on Airbnb & VRBO. Both the rating *and* the # of reviews matter. Vinifera collects reviews from 70-80% of guests (vs the industry average of 10-15%)

Strategic, dynamic pricing

6

As we build reviews, we ramp up the property's performance over 12-18 months via constant optimization on pricing and ranking



Contact us



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