



Vinifera Homes

Q3 2025 Sonoma Market Analysis

Who We Are



Harman Nagi
Head of Operations



Anish Patel
Head of Owner Relations

How We're Different

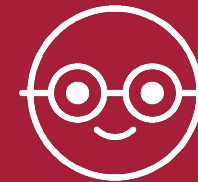


The short term game is not new to us.

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**.

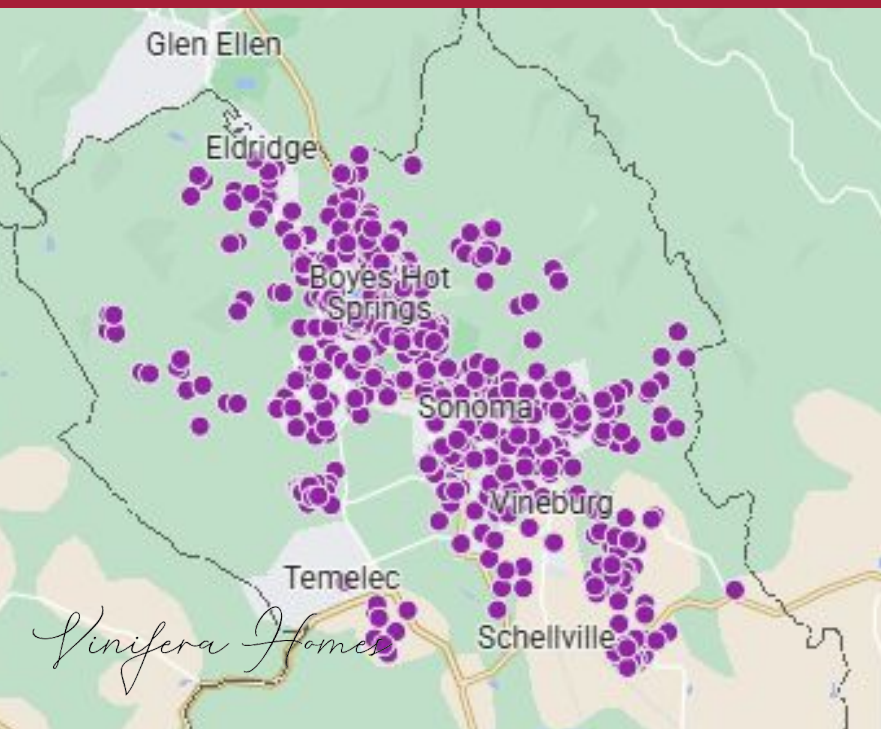


We're data nerds. We really enjoy digging into and tracking metrics to maximize performance.



We actually love what we do.

Sonoma Market Snapshot

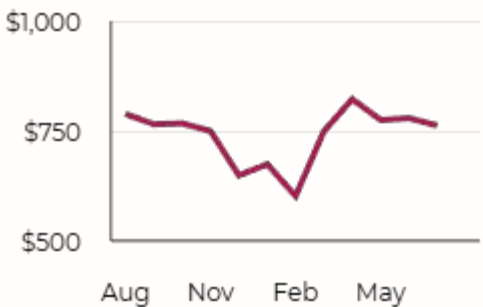


Demand Metrics



Revenue

Annual (YoY): \$126K(+3%)
Aug'25 / Aug'24 : (+5%)



ADR

Annual (YoY): \$753(+7%)
Aug'25 / Aug'24 : (+6%)

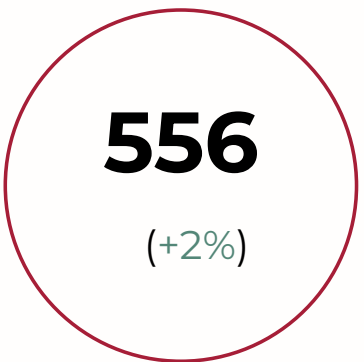


Occupancy

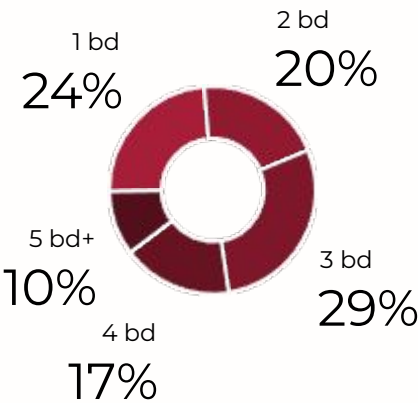
Annual (YoY): 53% (-4%)
Aug'25 / Aug'24 : (-2%)

Supply Metrics

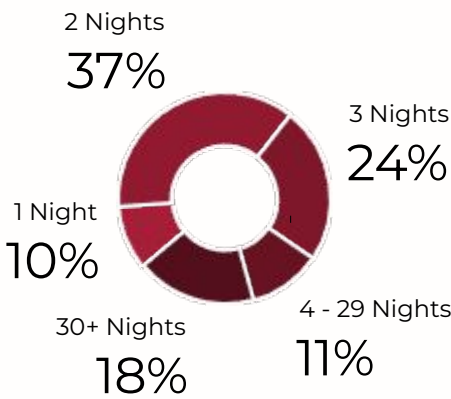
Active Listings



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	\$153,650	\$728	58%	5 (63)	3	6	✗	✗	★★★	★★	★★
Comp 2	\$151,196	\$649	66%	4.95 (470)	3	6	✗	✗	★★★	★★	★★
Comp 3	\$143,079	\$761	56%	5 (172)	3	6	✗	✓	★★★	★★	★★
Comp 4	\$116,337	\$536	60%	5 (312)	3	6	✓	✗	★★	★★	★★
Comp 5	\$114,093	\$776	47%	5 (129)	3	6	✗	✗	★	★★	★
Comp 6	\$111,505	\$541	63%	5 (529)	3	6	✗	✓	★	★★★	★★
Comp 7	\$109,429	\$882	39%	5 (125)	3	6	✗	✓	★★	★★	★★
Comp 8	\$107,627	\$1,006	47%	5 (86)	3	6	✓	✓	★★★	★★	★★
Comp 9	\$104,144	\$569	63%	4.9 (40)	3	6	✗	✓	★★	★★★	★★
Comp 10	\$100,505	\$628	45%	4.95 (309)	3	6	✗	✗	★★★	★★	★★
Comp 11	\$99,790	\$418	72%	4.8 (525)	3	6	✗	✓	★★★	★★	★
Comp 12	\$98,906	\$727	45%	4.9 (165)	3	6	✗	✓	★	★★	★★
Comp 13	\$98,810	\$633	75%	4.95 (251)	3	6	✓	✗	★★	★★	★
Comp 14	\$98,577	\$1,027	44%	5 (6)	3	6	✓	✓	★★	★★	★★
Comp 15	\$96,709	\$930	50%	3 (2)	3	6	✓	✓	★★★	★★★	★★
Comp 16	\$88,924	\$773	33%	4.95 (40)	3	6	✗	✗	★★★	★★★	★★
Comp 17	\$88,560	\$932	43%	4.95 (114)	3	6	✓	✓	★★	★★	★
Comp 18	\$80,276	\$647	35%	4.95 (99)	3	6	✗	✓	★★★	★★	★★
Comp 19	\$77,899	\$1,129	28%	5 (117)	3	6	✓	✓	★★	★★	★★
Comp 20	\$75,487	\$261	82%	4.9 (433)	3	6	✗	✗	★★	★★	★★

Competitive Analysis - 4 BRs that Sleep 8

Sonoma Comps (linked)	Revenue	ADR	Occ	Rating (#)*	# BRs	Sleeps	Pool	Hot Tub	Views	2Arch. & Design	Photos & Listing
Comp 1	\$547,869	\$2,686	70%	5 (12)	4	8	✓	✓	★★★	★★	★★
Comp 2	\$392,796	\$1,209	95%	5 (292)	4	8	✓	✓	★★★	★★★	★★
Comp 3	\$291,491	\$1,205	74%	5 (342)	4	8	✓	✓	★★★	★★	★★
Comp 4	\$273,403	\$1,657	48%	4.9 (195)	4	8	✓	✗	★★★	★★★	★★
Comp 5	\$271,563	\$933	80%	4.95 (287)	4	8	✓	✗	★★★	★★	★★
Comp 6	\$269,629	\$2,012	64%	5 (59)	4	8	✓	✓	★★	★★★	★★
Comp 7	\$261,696	\$2,077	64%	5 (89)	4	8	✓	✓	★★★	★★	
Comp 8	\$256,921	\$1,304	70%	5 (29)	4	8	✓	✓	★★	★★★	★★
Comp 9	\$245,474	\$1,036	73%	4.95 (209)	4	8	✗	✓	★★	★★★	★★
Comp 10	\$238,788	\$1,756	42%	4.9 (22)	4	8	✓	✗	★★	★★	★
Comp 11	\$237,982	\$1,239	54%	4.8 (83)	4	8	✓	✓	★★	★★★	★
Comp 12	\$235,982	\$1,594	43%	4.9 (12)	4	8	✓	✗	★★★	★★★	★★
Comp 13	\$235,326	\$2,503	28%	5 (70)	4	8	✓	✓	★★★	★★	★★
Comp 14	\$232,368	\$1,313	64%	5 (22)	4	8	✓	✗	★★★	★★★	★★
Comp 15	\$217,667	\$1,140	76%	4.85 (28)	4	8	✓	✓	★★	★★	★★
Comp 16	\$216,730	\$1,172	70%	4.9 (270)	4	8	✓	✗	★★	★★	★★
Comp 17	\$209,483	\$1,507	48%	5 (24)	4	8	✓	✗	★★	★★	★
Comp 18	\$183,726	\$1,267	59%	5 (38)	4	8	✓	✓	★★★	★★	★★
Comp 19	\$180,645	\$2,076	31%	5 (11)	4	8	✓	✓	★★	★	★★
Comp 20	\$177,855	\$1,170	46%	5 (277)	4	8	✗	✓	★	★★	★★
Comp 21	\$158,635	\$1,688	31%	5 (187)	4	8	✓	✗	★★	★★★	★★
Comp 22	\$152,915	\$780	59%	4.95 (218)	4	8	✓	✓	★★	★	★
Comp 23	\$146,164	\$727	67%	4.8 (185)	4	8	✓	✓	★	★★	★★
Comp 24	\$135,786	\$1,037	37%	4.95 (247)	4	8	✗	✓	★★	★★	★★

Competitive Analysis - 5 BRs that Sleep 10+

Sonoma Comps (linked)	Revenue	ADR	Occ	Rating (#)*	# BRs	Sleeps	Pool	Hot Tub	Views	Arch. & Design	Photos & Listing
Comp 1	\$704,965	\$2,043	97%	5 (148)	5	10	✓	✓	★★★★	★★	★★★★
Comp 2	\$526,000	\$2,447	60%	5 (4)	5	10	✓	✓	★★★★	★★	★★
Comp 3	\$462,225	\$2,111	60%	5 (70)	5	10	✓	✓	★★★★	★★	★★
Comp 4	\$447,022	\$1,569	78%	4.95 (27)	5	10	✗	✓	★★★★	★★★★	★★
Comp 5	\$440,605	\$1,985	70%	5 (73)	5	10	✓	✓	★★	★★	★★
Comp 6	\$382,258	\$1,453	72%	4.85 (125)	5	10	✓	✓	★	★★	★★
Comp 7	\$340,061	\$2,112	46%	5 (49)	5	10	✓	✓	★★	★★	★★
Comp 9	\$337,071	\$2,161	46%	4.9 (50)	5	10	✗	✓	★★★★	★★★★	★★
Comp 10	\$275,799	\$1,135	75%	4.95 (354)	5	10	✓	✓	★★	★★	★★
Comp 11	\$242,604	\$2,186	39%	5 (80)	5	10	✓	✓	★★	★★	★
Comp 12	\$185,720	\$884	59%	4.95 (59)	5	10	✗	✓	★★	★★	★★
Comp 13	\$185,374	\$2,207	28%	4.95 (72)	5	10	✓	✗	★★	★	★★
Comp 14	136141	\$1,389	35%	5 (105)	5	10	✓	✓	★★	★★	★
Comp 15	123382	\$417	95%	4.5 (2)	5	10	✗	✓	★	★★	★★

Percentile Analysis of Sonoma City

Last 12 Month Vacation Rental Performance

Percentile		50th	60th	70th	80th	90th	95th
Median Revenue	3 bed	\$104,860	\$126,867	\$150,668	\$175,382	\$195,377	\$231,054
	4 bed	\$161,783	\$194,029	\$234,734	\$257,344	\$287,965	\$353,132
	5 bed	\$291,508	\$332,010	\$345,536	\$428,936	\$479,319	\$541,157
vs. 50th percentile	3 bed	0%	21%	44%	67%	86%	120%
	4 bed	0%	20%	45%	59%	78%	118%
	5 bed	0%	14%	19%	47%	64%	86%

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**
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**
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**
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**
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**
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**
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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