



Vinifera Homes

Q4 2025 Sonoma Market Analysis

Who We Are



Harman Nagi
Head of Operations



Anish Patel
Head of Owner Relations

How We're Different

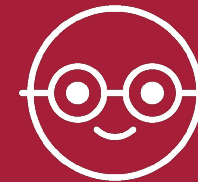


The short term game is not new to us.

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**.

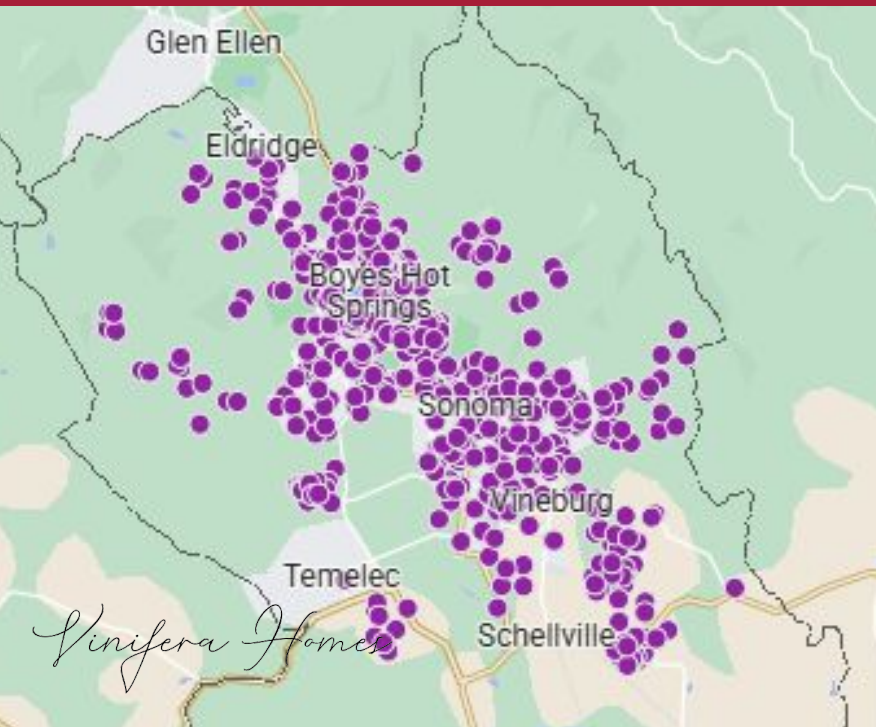


We're data nerds. We really enjoy digging into and tracking metrics to maximize performance.



We actually love what we do.

Sonoma Market Snapshot



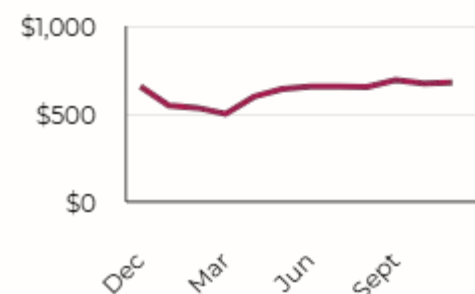
Demand Metrics



Revenue

Annual (YoY): \$104K(-1%)

Nov'25 / Nov'24 : (+2%)



ADR

Annual (YoY): \$641(0%)

Nov'25 / Nov'24 : (+7%)



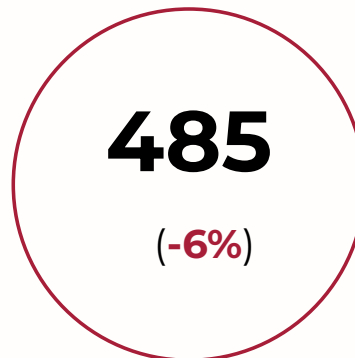
Occupancy

Annual (YoY): 51% (-2%)

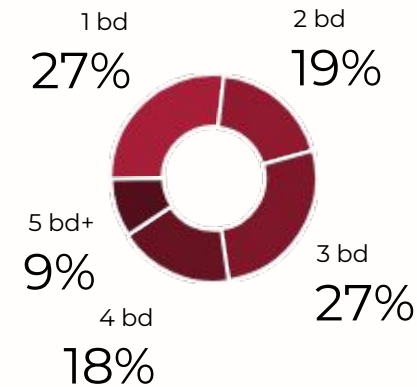
Nov'25 / Nov'24 : (-5%)

Supply Metrics

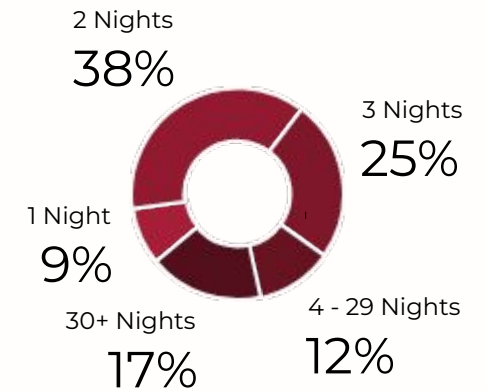
Active Listings



Listings by Bedroom



Listing by Min Stay



Competitive Analysis - 3 BRs that Sleep 6 - 8

Sonoma Comps (linked)	Revenue	ADR	Occ	Rating (#)*	# BRs	Sleeps	Pool	Hot Tub	Views	Arch. & Design	Photos & Listing
Comp 1	\$340,104	\$1,429	81%	5 (27)	3	6	✓	✓	★★★	★★	★★
Comp 2	\$222,796	\$1,526	66%	5 (20)	3	6	✓	✓	★★★	★★	★★
Comp 3	\$111,203	\$783	46%	5 (133)	3	6	✗	✗	★★★	★★	★★
Comp 4	\$85,015	\$787	49%	5 (19)	3	8	✓	✓	★★	★★	★★
Comp 5	\$82,205	\$587	41%	5 (48)	3	8	✓	✓	★	★★	★
Comp 6	\$80,610	\$588	41%	4.9 (139)	3	6	✗	✓	★★	★★★	★★
Comp 7	\$78,334	\$469	48%	4.95 (42)	3	6	✗	✗	★★	★★	★★
Comp 8	\$76,725	\$552	42%	4.95 (94)	3	8	✗	✗	★★	★★	★★

Competitive Analysis - 4 BRs that Sleep 8 - 10

Sonoma Comps (linked)	Revenue	ADR	Occ	Rating (#)*	# BRs	Sleeps	Pool	Hot Tub	Views	2Arch. & Design	Photos & Listing
Comp 1	\$371,628	\$2,445	58%	4.8 (38)	4	10	✓	✓	★★★	★★	★★
Comp 2	\$189,490	\$1,354	53%	5 (7)	4	8	✓	✓	★★★	★★★	★★★
Comp 3	\$146,477	\$1,032	70%	4.85 (28)	4	8	✓	✓	★★★	★	★★
Comp 4	\$146,228	\$1,179	64%	4.95 (20)	4	8	✓	✓	★★★	★	★★
Comp 5	\$112,324	\$1,195	48%	5 (20)	4	8	✗	✗	★★	★★	★

Percentile Analysis of Sonoma City

Last 12 Month Vacation Rental Performance

Percentile		50th	60th	70th	80th	90th	95th
Median Revenue	3 bed	\$46,250	\$51,188	\$57,656	\$71,049	\$83,048	\$127,942
	4 bed	\$46,858	\$50,189	\$81,792	\$94,740	\$162,080	\$345,405
	5 bed	\$248,988	\$335,652	\$395,101	\$400,118	\$405,135	\$407,644
vs. 50th percentile	3 bed	0%	11%	25%	54%	80%	177%
	4 bed	0%	7%	75%	102%	246%	637%
	5 bed	0%	35%	59%	61%	63%	64%


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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