

*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**.

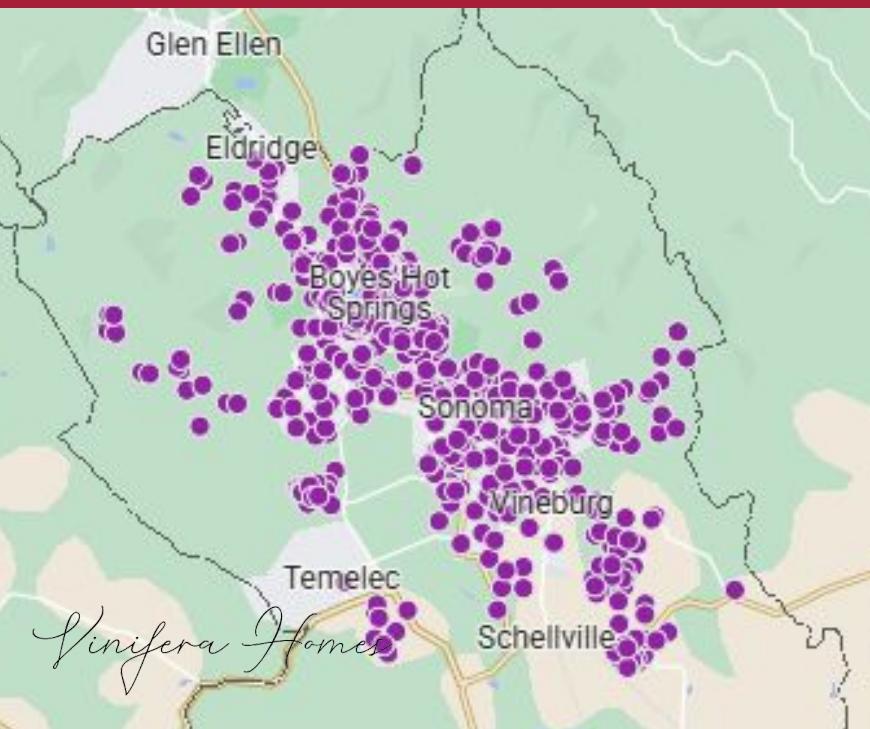


**We're data nerds.** We really enjoy digging into and tracking metrics to maximize performance.



**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%)

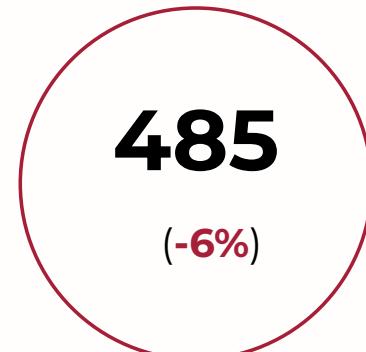


### Occupancy

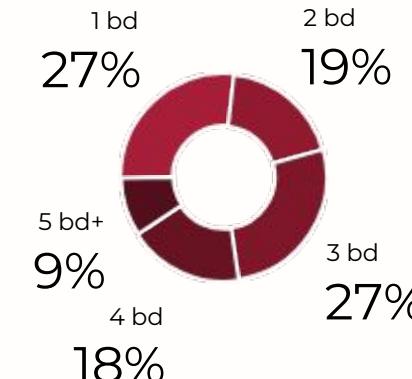
Annual (YoY): 51% (-2%)  
Nov'25 / Nov'24 : (-5%)

## Supply Metrics

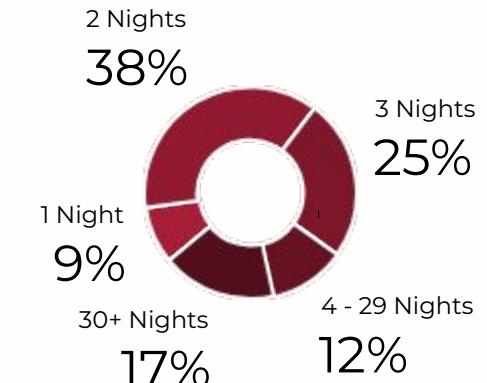
### Active Listings



### 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
<a href="#">Comp 1</a>	\$340,104	\$1,429	81%	5 (27)	3	6	✓	✓	★★★	★★	★★
<a href="#">Comp 2</a>	\$222,796	\$1,526	66%	5 (20)	3	6	✓	✓	★★★	★★	★★
<a href="#">Comp 3</a>	\$111,203	\$783	46%	5 (133)	3	6	✗	✗	★★★	★★	★★
<a href="#">Comp 4</a>	\$85,015	\$787	49%	5 (19)	3	8	✓	✓	★★	★★	★★
<a href="#">Comp 5</a>	\$82,205	\$587	41%	5 (48)	3	8	✓	✓	★	★★	★
<a href="#">Comp 6</a>	\$80,610	\$588	41%	4.9 (139)	3	6	✗	✓	★★	★★★	★★
<a href="#">Comp 7</a>	\$78,334	\$469	48%	4.95 (42)	3	6	✗	✗	★★	★★	★★
<a href="#">Comp 8</a>	\$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
<a href="#">Comp 1</a>	\$371,628	\$2,445	58%	4.8 (38)	4	10	✓	✓	★★★	★★	★★
<a href="#">Comp 2</a>	\$189,490	\$1,354	53%	5 (7)	4	8	✓	✓	★★★	★★★	★★★
<a href="#">Comp 3</a>	\$146,477	\$1,032	70%	4.85 (28)	4	8	✓	✓	★★★	★	★★
<a href="#">Comp 4</a>	\$146,228	\$1,179	64%	4.95 (20)	4	8	✓	✓	★★★	★	★★
<a href="#">Comp 5</a>	\$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
<b>Median Revenue</b>	<b>3 bed</b>	\$46,250	\$51,188	\$57,656	\$71,049	\$83,048	\$127,942
	<b>4 bed</b>	\$46,858	\$50,189	\$81,792	\$94,740	\$162,080	\$345,405
	<b>5 bed</b>	\$248,988	\$335,652	\$395,101	\$400,118	\$405,135	\$407,644
<b>vs. 50th percentile</b>	<b>3 bed</b>	0%	11%	25%	54%	80%	177%
	<b>4 bed</b>	0%	7%	75%	102%	246%	637%
	<b>5 bed</b>	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**

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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