



*Vinifera Homes*

Q1 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.**



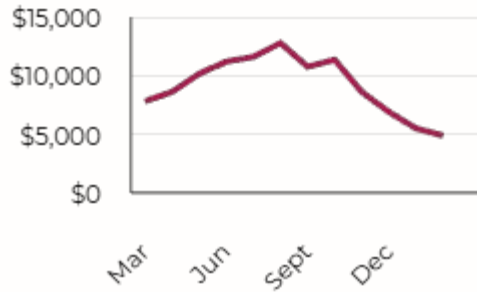
**We're data nerds.** We really enjoy digging into and tracking metrics to maximize performance.



**We actually love what we do.**

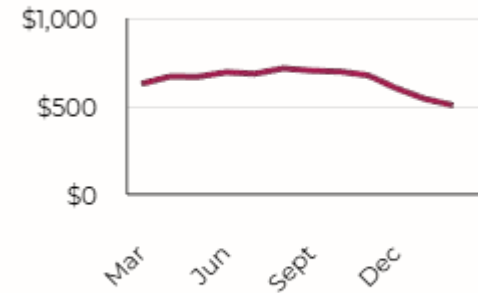
# Sonoma Market Snapshot

## Demand Metrics



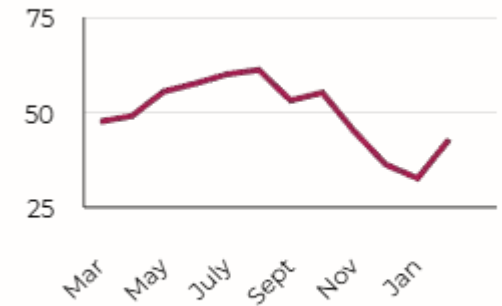
Revenue

Annual (YoY): \$110K(0%)  
Feb'26 / Feb'25 : (-8%)



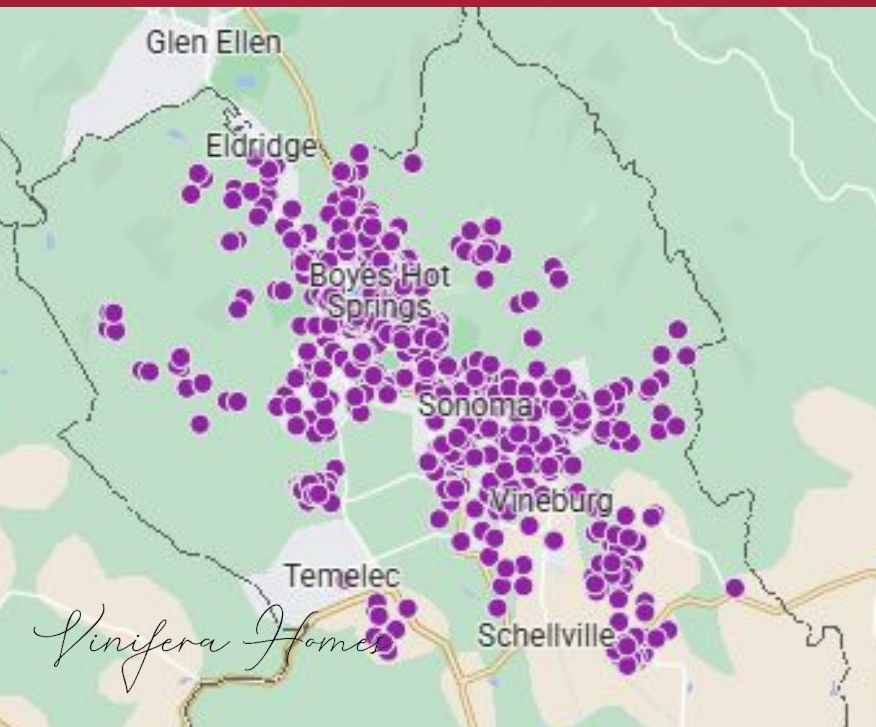
ADR

Annual (YoY): \$665(+1%)  
Feb'26 / Feb'25 : (-4%)

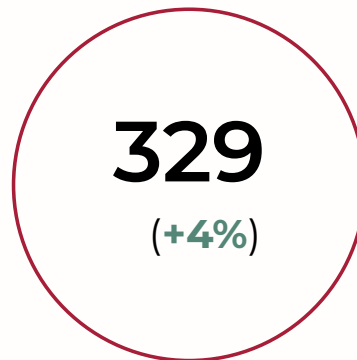


Occupancy

Annual (YoY): 51% (-1%)  
Feb'26 / Feb'25 : (+1%)

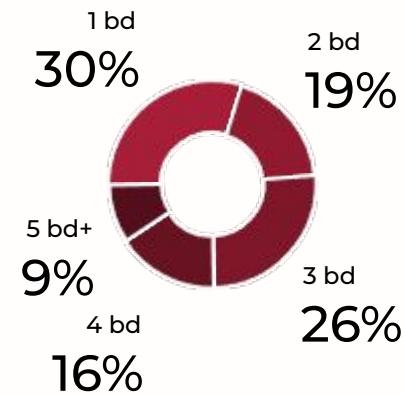


Active Listings

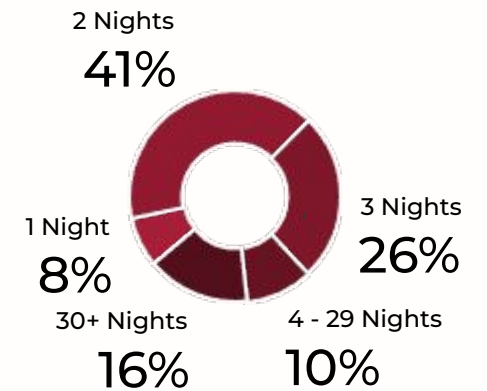


## Supply Metrics

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
<a href="#">Comp 1</a>	\$244,681	\$1,510	55%	4.95 (59)	3	6	✓	✓	★★★	★★	★★
<a href="#">Comp 2</a>	\$229,982	\$1,385	66%	5 (29)	3	6	✓	✓	★★★	★★★	★★
<a href="#">Comp 3</a>	\$228,363	\$1,234	57%	4.95 (100)	3	6	✓	✓	★★★	★	★★
<a href="#">Comp 4</a>	\$226,460	\$1,272	54%	4.95 (156)	3	6	✓	✓	★★	★★	★★
<a href="#">Comp 5</a>	\$148,681	\$875	56%	4.95 (108)	3	6	✓	✓	★	★★	★
<a href="#">Comp 6</a>	\$145,665	\$971	42%	5 (41)	3	6	✗	✓	★	★	★★
<a href="#">Comp 7</a>	\$130,455	\$694	54%	5 (195)	3	6	✗	✓	★★	★★	★★
<a href="#">Comp 8</a>	\$126,851	\$869	52%	4.95 (42)	3	6	✓	✓	★★	★★	★★
<a href="#">Comp 9</a>	\$115,648	\$925	42%	4.95 (117)	3	6	✓	✓	★	★	★
<a href="#">Comp 10</a>	\$113,430	\$637	50%	4.95 (115)	3	6	✗	✓	★★	★	★★
<a href="#">Comp 11</a>	\$112,995	\$657	62%	5 (66)	3	6	✗	✗	★	★	★
<a href="#">Comp 12</a>	\$106,804	\$574	55%	5 (233)	3	6	✗	✓	★	★★	★★
<a href="#">Comp 13</a>	\$105,637	\$852	46%	5 (352)	3	6	✗	✗	★★★	★★	★★
<a href="#">Comp 14</a>	\$103,833	\$692	48%	5 (66)	3	6	✓	✓	★★★	★	★
<a href="#">Comp 15</a>	\$101,058	\$886	42%	5 (98)	3	6	✓	✓	★★	★★	★★
<a href="#">Comp 16</a>	\$100,870	\$848	36%	5 (134)	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
<a href="#">Comp 1</a>	\$296,350	\$1,568	58%	5 (8)	4	8	✓	✓	★★★	★★	★★
<a href="#">Comp 2</a>	\$255,047	\$1,119	69%	4.9 (54)	4	8	✓	✓	★★★	★★★	★★★
<a href="#">Comp 3</a>	\$241,740	\$1,690	43%	4.9 (27)	4	8	✓	✗	★★★	★★	★★
<a href="#">Comp 4</a>	\$226,600	\$1,827	57%	5 (66)	4	8	✓	✓	★★★	★	★★
<a href="#">Comp 5</a>	\$210,877	\$864	69%	4.9 (316)	4	8	✓	✗	★	★★	★
<a href="#">Comp 6</a>	\$210,710	\$1,033	62%	5 (258)	4	8	✓	✓	★	★★	★★
<a href="#">Comp 7</a>	\$210,443	\$1,283	48%	5 (26)	4	8	✓	✗	★★★	★★	★★
<a href="#">Comp 8</a>	\$205,278	\$1,591	38%	5 (220)	4	8	✓	✗	★★★	★★★	★★
<a href="#">Comp 9</a>	\$158,533	\$2,366	25%	5 (74)	4	8	✓	✓	★★	★★★	★★
<a href="#">Comp 10</a>	\$151,155	\$1,482	34%	4.95 (18)	4	8	✓	✗	★★	★	★★
<a href="#">Comp 11</a>	\$149,153	\$1,421	55%	4.95 (35)	4	8	✓	✓	★★★	★	★★
<a href="#">Comp 12</a>	\$148,169	\$1,593	36%	4.9 (198)	4	8	✓	✗	★★	★★	★★
<a href="#">Comp 13</a>	\$140,653	\$984	51%	5 (330)	4	8	✗	✓	★★	★★★	★★
<a href="#">Comp 14</a>	\$140,329	\$1,088	54%	4.85 (278)	4	8	✓	✗	★★★	★★	★★
<a href="#">Comp 15</a>	\$131,691	\$761	49%	5 (302)	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
<a href="#">Comp 1</a>	\$443,837	\$1,865	66%	5 (16)	5	10	✓	✗	★★★	★★	★★
<a href="#">Comp 2</a>	\$419,456	\$1,907	66%	5 (78)	5	10	✓	✓	★★★	★★	★★★
<a href="#">Comp 3</a>	\$352,336	\$2,123	47%	5 (75)	5	10	✓	✓	★★★	★★	★★
<a href="#">Comp 4</a>	\$278,942	\$1,348	58%	4.85 (139)	5	10	✓	✓	★★★	★★★	★★
<a href="#">Comp 5</a>	\$275,610	\$1,681	51%	5 (32)	5	10	✓	✓	★★	★★	★
<a href="#">Comp 6</a>	\$273,842	\$1,165	69%	4.95 (382)	5	10	✓	✓	★	★★	★★
<a href="#">Comp 7</a>	\$268,315	\$1,474	59%	5 (41)	5	10	✓	✓	★★	★★	★★
<a href="#">Comp 8</a>	\$246,478	\$2,181	35%	5 (90)	5	10	✓	✓	★★★	★★★	★★
<a href="#">Comp 9</a>	\$237,907	\$1,451	56%	4.95 (35)	5	10	✗	✓	★★	★★	★★
<a href="#">Comp 10</a>	\$234,255	\$1,952	37%	4.95 (107)	5	10	✗	✓	★	★★	★
<a href="#">Comp 11</a>	\$152,040	\$2,083	24%	5 (82)	5	10	✓	✗	★★	★★	★★
<a href="#">Comp 12</a>	\$128,999	\$2,389	20%	5 (6)	5	10	✓	✓	★★	★	★★
<a href="#">Comp 13</a>	\$126,227	\$830	44%	4.95 (72)	5	10	✗	✓	★★	★★	★
<a href="#">Comp 14</a>	\$57,333	\$610	32%	4.75 (259)	5	10	✗	✗	★	★	★★

# Percentile Analysis of Sonoma City Last 12 Month Vacation Rental Performance

	Percentile	50th	60th	70th	80th	90th	95th
Median Revenue	3 bed	\$103,725	\$113,206	\$131,566	\$159,692	\$203,229	\$227,507
	4 bed	\$124,519	\$145,775	\$172,007	\$225,414	\$265,491	\$332,475
	5 bed	\$271,079	\$279,792	\$311,877	\$368,917	\$437,347	\$459,882
vs. 50th percentile	3 bed	0%	9%	27%	54%	96%	119%
	4 bed	0%	17%	38%	81%	113%	167%
	5 bed	0%	3%	15%	36%	61%	70%

**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

## 1 **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

## 2 **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

## 3 **Lifestyle photos**

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

## 4 **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

## 5 **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%)

## 6 **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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