

Q3 2026 Market Analysis

Healdsburg · Sonoma County, California

Twelve months of demand and supply data for the Healdsburg submarket, the competitive set at every bedroom count, and what separates the top of the market from the middle.

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.**



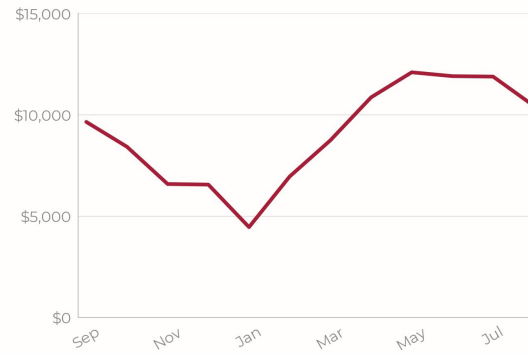
We're data nerds. We really enjoy digging into and tracking metrics to maximize performance.



We actually love what we do.

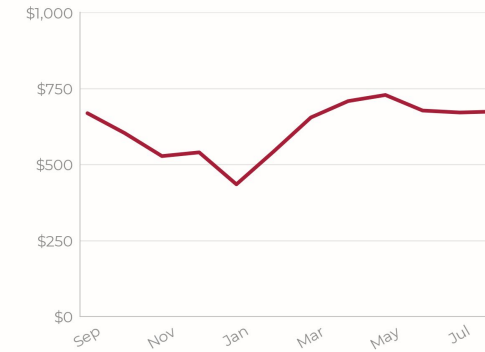
Healdsburg Market Snapshot

Demand Metrics



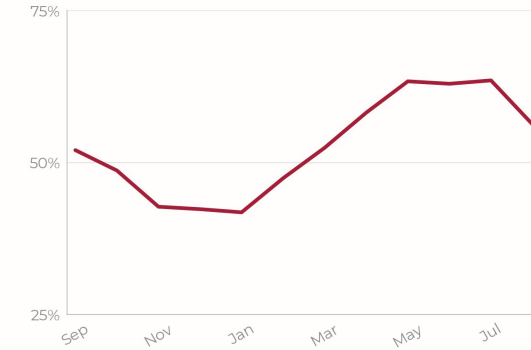
Revenue

Annual (YoY): \$108.5K **(+10%)**
Sep'26 / Sep'25 : **(+16%)**



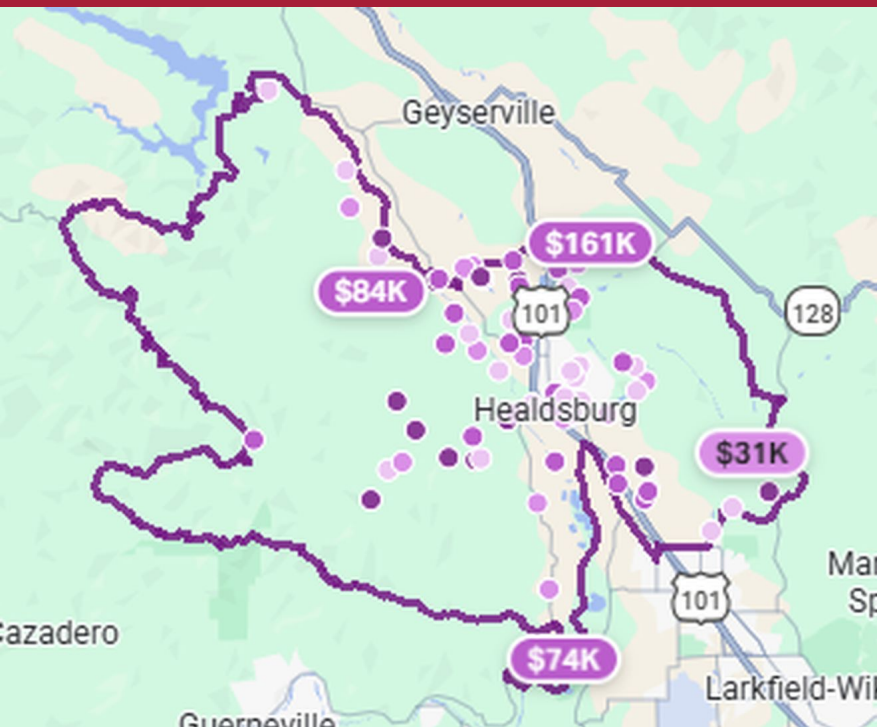
ADR

Annual (YoY): \$639 **(+4%)**
Sep'26 / Sep'25 : **(+6%)**

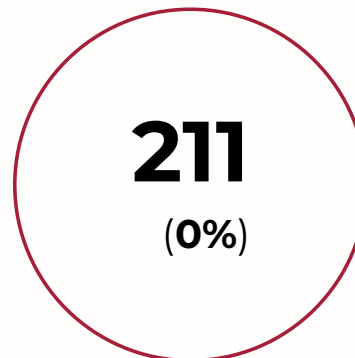


Occupancy

Annual (YoY): 53% **(+4%)**
Sep'26 / Sep'25 : **(+13%)**



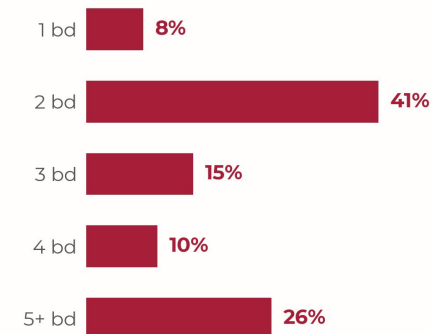
Active Listings



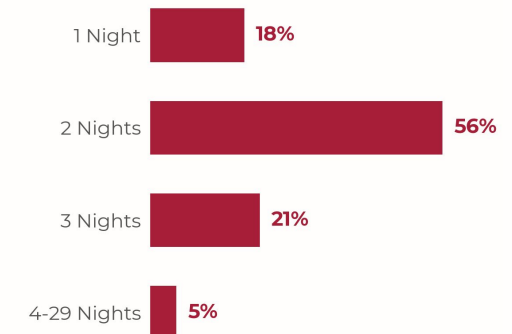
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Supply Metrics

Listings by Bedroom



Listing by Min Stay



COMPETITIVE ANALYSIS

3 BRs that sleep 6

Fifteen three-bedroom homes, ranked by trailing-twelve-month revenue.

Healdsburg comps (linked)	Revenue	ADR	Occ	Rating (#)*	# BRs	Sleeps	Pool	Hot tub	Views	Arch. & design	Photos & listing
Comp 1	\$345,353	\$1,457	83%	5 (155)	3	6	✓	✓	★★	★★	★★
Comp 2	\$195,468	\$1,123	56%	5 (47)	3	6	✓	—	★★★★	★★	★★
Comp 3	\$177,285	\$1,294	56%	4.9 (27)	3	6	✓	✓	★★	★	★
Comp 4	\$166,327	\$665	74%	4.95 (218)	3	6	—	✓	★★★★	★★	★★
Comp 5	\$134,522	\$857	53%	5 (165)	3	6	✓	✓	★★	★	★★
Comp 6	\$131,344	\$1,354	34%	5 (46)	3	6	✓	—	★★★★	★★	★★
Comp 7	\$125,723	\$740	64%	5 (116)	3	6	—	—	★★★★	★★	★★
Comp 8	\$117,988	\$787	44%	4.85 (29)	3	6	✓	—	★★★★	★★	★★
Comp 9	\$101,329	\$548	53%	4.95 (54)	3	6	—	—	★★	★	★
Comp 10	\$100,714	\$556	60%	5 (291)	3	6	—	—	★★★★	★★	★★
Comp 11	\$98,419	\$887	34%	4.85 (153)	3	6	✓	✓	★★★★	★★★★	★★
Comp 12	\$98,187	\$755	44%	4.95 (46)	3	6	—	—	★	★	★
Comp 13	\$96,312	\$563	53%	4.9 (50)	3	6	✓	✓	★★★★	★★★★	★★★★
Comp 14	\$89,398	\$468	80%	5 (25)	3	6	—	✓	★★	★	★★
Comp 15	\$81,278	\$478	50%	4.9 (75)	3	6	—	—	★★★★	★★	★★

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

*Ratings above 5.0 are VRBO ratings, on a scale of 1–10.

COMPETITIVE ANALYSIS

4 BRs that sleep 8

Eleven four-bedroom homes, ranked by trailing-twelve-month revenue.

Healdsburg comps (linked)	Revenue	ADR	Occ	Rating (#)*	# BRs	Sleeps	Pool	Hot tub	Views	Arch. & design	Photos & listing
Comp 1	\$421,655	\$3,765	47%	5 (38)	4	8	✓	—	★★★★	★★	★★
Comp 2	\$251,078	\$1,249	58%	5 (15)	4	8	✓	—	★★★★	★★	★
Comp 3	\$242,005	\$2,373	43%	5 (17)	4	8	✓	—	★★★★	★★	★★
Comp 4	\$236,792	\$1,499	51%	4.95 (45)	4	8	✓	✓	★★★★	★★	★★
Comp 5	\$176,666	\$1,015	48%	4.95 (95)	4	8	—	✓	★★★★	★★	★★
Comp 6	\$158,006	\$1,206	41%	4.95 (166)	4	8	✓	✓	★★★★	★★	★★
Comp 7	\$151,280	\$1,845	39%	4.95 (92)	4	8	✓	✓	★★★★	★	★★
Comp 8	\$148,140	\$968	47%	4.85 (60)	4	8	—	✓	★★★★	★★	★
Comp 9	\$113,865	\$2,530	23%	5 (38)	4	8	✓	✓	★★★★	★★	★★
Comp 10	\$105,821	\$4,070	12%	0 (0)	4	8	✓	✓	★★★★	★★	★
Comp 11	\$92,772	\$1,385	35%	5 (40)	4	8	✓	✓	★★	★★	★★

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

*Ratings above 5.0 are VRBO ratings, on a scale of 1–10.

COMPETITIVE ANALYSIS

5 BRs that sleep 10+

Eleven five-bedroom homes, ranked by trailing-twelve-month revenue.

Healdsburg comps (linked)	Revenue	ADR	Occ	Rating (#)*	# BRs	Sleeps	Pool	Hot tub	Views	Arch. & design	Photos & listing
Comp 1	\$590,966	\$3,194	51%	4.95 (18)	5	12	✓	✓	★★★★	★★	★★
Comp 2	\$349,468	\$2,068	55%	5 (78)	5	12	✓	✓	★★★★	★★	★★
Comp 3	\$239,440	\$977	80%	4.95 (156)	5	12	✓	✓	★★	★	★★
Comp 4	\$181,756	\$2,456	26%	5 (39)	5	12	✓	✓	★★★★	★★	★★
Comp 5	\$178,434	\$1,919	30%	5 (207)	5	12	✓	✓	★★★★	★★	★
Comp 6	\$170,474	\$1,353	42%	5 (158)	5	10	✓	✓	★★★★	★★	★★
Comp 7	\$152,164	\$1,383	35%	4.9 (179)	5	10	—	—	★★	★	★★
Comp 8	\$140,081	\$1,843	26%	4.85 (146)	5	10	✓	✓	★★★★	★★	★
Comp 9	\$139,652	\$1,183	40%	5 (9)	5	10	✓	✓	★★★★	★★	★★
Comp 10	\$128,501	\$1,785	24%	4.95 (30)	5	12	✓	✓	★★	★★	★★
Comp 11	\$95,949	\$1,713	26%	5 (50)	5	10	✓	—	★★★★	★★	★★

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

*Ratings above 5.0 are VRBO ratings, on a scale of 1–10.

PERCENTILE ANALYSIS

Where a home lands is a management outcome

Healdsburg city, last twelve months of vacation rental performance. Source: AirDNA.

MEDIAN REVENUE

Bedrooms	50th	60th	70th	80th	90th
3 bed	\$98,419	\$108,362	\$119,147	\$132,615	\$167,826
4 bed	\$149,710	\$157,035	\$182,849	\$226,989	\$242,912
5 bed	\$170,474	\$179,098	\$184,013	\$218,623	\$327,462

LIFT VS. THE 50TH PERCENTILE

Bedrooms	50th	60th	70th	80th	90th
3 bed	0%	10%	21%	35%	71%
4 bed	0%	5%	22%	52%	62%
5 bed	0%	5%	8%	28%	92%

WHAT THIS DATA MEANS

A home at the 50th percentile outperforms half the market. A home managed well enough to reach the top of the range earns roughly 71% more than a median home — same market, same bedroom count.

How to set a vacation rental up for success

Six things that decide whether a home performs at the median or at the top of its market.

01 Pick your target audience

Who are you trying to attract? Couples on a romantic getaway, small family travelers, adventure seekers, luxury travelers, wine enthusiasts.

02 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 that audience and stand out from the crowd.

03 Lifestyle photos

Obtain high quality, professionally staged photos that set the scene and showcase the guest experience your target audience is buying.

04 Deliver an amazing guest experience

Build rapport from the moment they book through post-stay follow-up: personalized recommendations, a guidebook, and quick responses.

05 Build amazing reviews

Reviews increase ranking on Airbnb and VRBO — both the rating and the count matter. Vinifera collects reviews from 70–80% of guests, against an industry average of 10–15%.

06 Strategic, dynamic pricing

As reviews build, we ramp the property's performance over 12–18 months through constant optimization on pricing and ranking.



NEXT STEPS

Let's talk about your home

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Unreasonable hospitality.

Unrelenting standards.

Undeniable care.