

Q3 2026 Market Analysis

Santa Rosa · Sonoma County, California

Twelve months of demand and supply data for the Santa Rosa 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.**

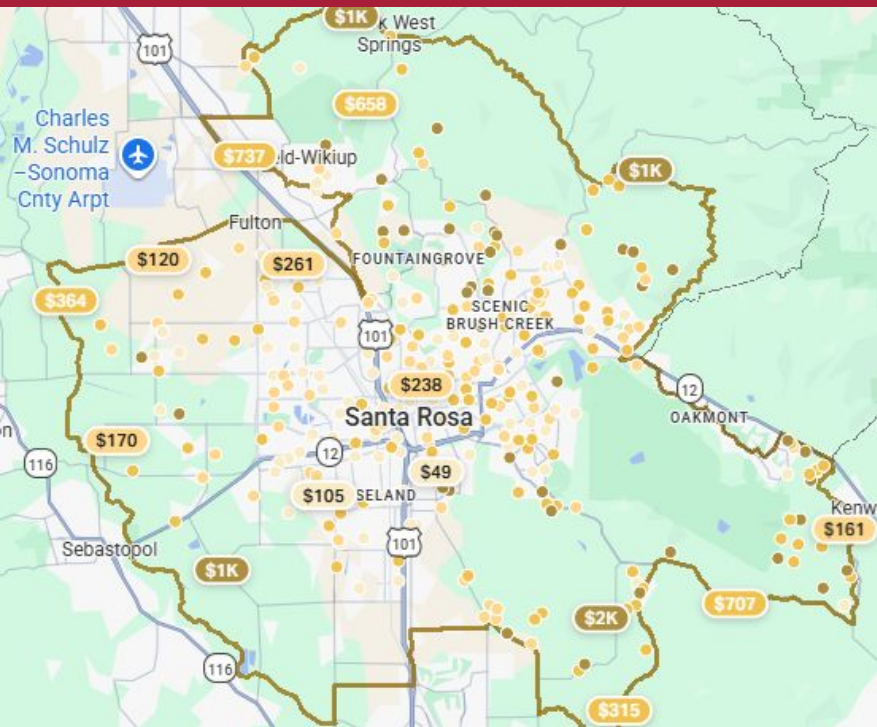


We're data nerds. We really enjoy digging into and tracking metrics to maximize performance.

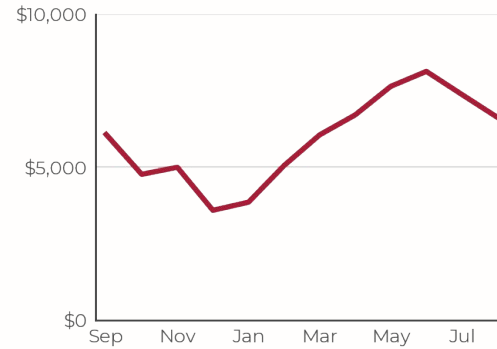


We actually love what we do.

Santa Rosa Market Snapshot

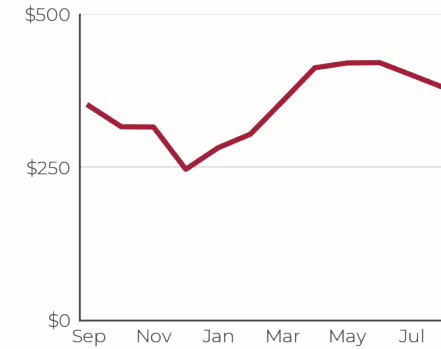


Demand Metrics



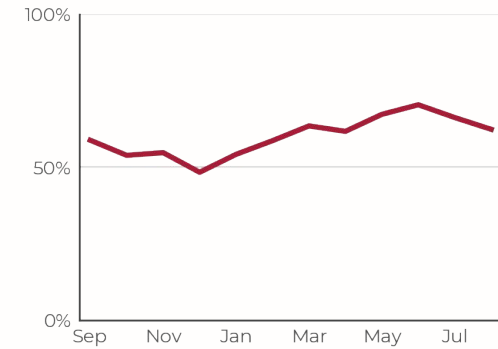
Revenue

Annual (YoY): \$71K(+7%)
Sep'26 / Sep'25 : (+20%)



ADR

Annual (YoY): \$358(+4%)
Sep'26 / Sep'25 : (+15%)

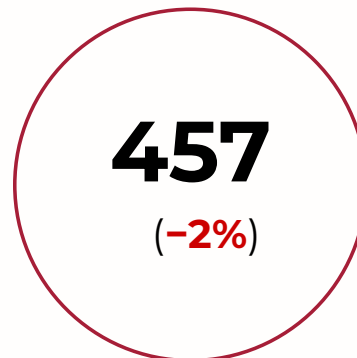


Occupancy

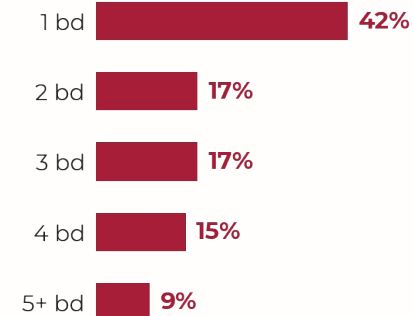
Annual (YoY): 60% (+3%)
Sep'26 / Sep'25 : (+4%)

Supply Metrics

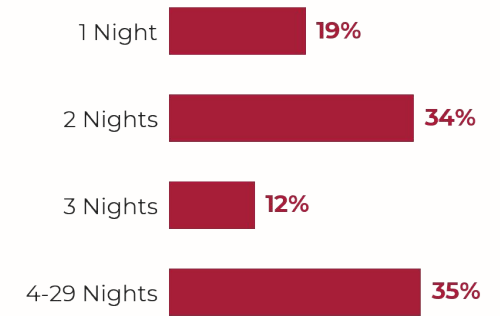
Active Listings



Listings by Bedroom



Listing by Min Stay



3 BRs that sleep 6

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

Santa Rosa comps (linked)	Revenue	ADR	Occ	Rating (#)*	# BRs	Sleeps	Pool	Hot tub	Views	Arch. & design	Photos & listing
Comp 1	\$261,138	\$978	84%	4.95 (103)	3	6	✓	✓	★★★	★★	★★★
Comp 2	\$122,504	\$609	56%	5 (139)	3	6	✓	—	★★	★★	★★
Comp 3	\$113,903	\$511	64%	4.95 (102)	3	6	✓	✓	★★	★★	★★
Comp 4	\$110,608	\$1,074	55%	4.9 (41)	3	6	✓	✓	★★	★★★	★★
Comp 5	\$110,559	\$485	82%	4.9 (118)	3	6	—	—	★★	★★	★★
Comp 6	\$99,385	\$368	76%	4.95 (143)	3	6	—	✓	★★	★★	★★
Comp 7	\$97,847	\$418	89%	4.9 (9)	3	6	✓	✓	★★	★★	★★
Comp 8	\$97,694	\$452	64%	4.95 (256)	3	6	✓	—	★	★	★★
Comp 9	\$97,240	\$438	62%	5 (339)	3	6	—	✓	★	★★	★★
Comp 10	\$88,950	\$343	75%	4.95 (51)	3	6	—	✓	★★	★★	★★
Comp 11	\$86,773	\$445	66%	4.85 (270)	3	6	✓	✓	★	★★	★
Comp 12	\$85,158	\$430	64%	4.85 (62)	3	6	—	✓	★★★	★	★★
Comp 13	\$83,740	\$325	74%	4.95 (253)	3	6	—	—	★	★★	★★
Comp 14	\$83,733	\$299	78%	4.95 (713)	3	6	—	—	★★	★	★
Comp 15	\$83,677	\$309	75%	4.95 (234)	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

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

Santa Rosa comps (linked)	Revenue	ADR	Occ	Rating (#)*	# BRs	Sleeps	Pool	Hot tub	Views	Arch. & design	Photos & listing
Comp 1	\$296,072	\$1,117	84%	4.95 (83)	4	8	✓	✓	★★★★	★★	★★
Comp 2	\$283,577	\$1,157	72%	5 (50)	4	8	✓	✓	★★★★	★★	★★
Comp 3	\$270,508	\$1,470	55%	5 (39)	4	8	✓	✓	★★★★	★	★★
Comp 4	\$268,568	\$1,105	73%	4.95 (113)	4	8	✓	—	★★★★	★★	★★
Comp 5	\$169,120	\$1,113	48%	5 (162)	4	8	✓	✓	★★	★★	★★
Comp 6	\$164,258	\$990	53%	4.9 (60)	4	8	—	✓	★★	★★	★
Comp 7	\$155,737	\$779	63%	5 (31)	4	8	✓	✓	★	★★	★★
Comp 8	\$151,583	\$555	76%	4.85 (200)	4	8	—	✓	★	★★	★
Comp 9	\$144,848	\$533	88%	4.8 (19)	4	8	✓	—	★	★	★★
Comp 10	\$129,491	\$1,245	32%	5 (75)	4	8	✓	✓	★★	★★	★★
Comp 11	\$128,002	\$561	64%	4.9 (151)	4	8	—	✓	★	★★	★★
Comp 12	\$126,684	\$696	69%	4.6 (182)	4	8	✓	✓	★★	★★	★
Comp 13	\$124,524	\$1,021	42%	5 (21)	4	8	✓	—	★	★	★★
Comp 14	\$123,398	\$569	65%	4.8 (89)	4	8	✓	✓	★★	★★	★★
Comp 15	\$117,009	\$929	39%	5 (155)	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

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

Santa Rosa comps (linked)	Revenue	ADR	Occ	Rating (#)*	# BRs	Sleeps	Pool	Hot tub	Views	Arch. & design	Photos & listing
Comp 1	\$285,799	\$1,282	65%	4.9 (88)	5	10	✓	✓	★★★★	★★	★★
Comp 2	\$246,279	\$1,109	65%	4.9 (141)	5	10	✓	✓	★★★★	★★	★★
Comp 3	\$226,337	\$1,572	49%	5 (84)	5	10	✓	—	★★★★	★★	★★
Comp 4	\$219,391	\$1,625	54%	5 (18)	5	10	✓	✓	★★★★	★	★★
Comp 5	\$198,002	\$1,165	48%	4.9 (196)	5	10	✓	—	★★★★	★★	★
Comp 6	\$194,534	\$1,179	60%	4.95 (155)	5	10	✓	✓	★★★★	★★	★★
Comp 7	\$144,360	\$708	63%	5 (137)	5	10	✓	—	★★★★	★	★★
Comp 8	\$131,304	\$980	61%	4.45 (9)	5	10	✓	✓	★★★★	★★	★★
Comp 9	\$131,032	\$575	74%	4.65 (114)	5	10	✓	—	★★★★	★★	★★
Comp 10	\$121,366	\$578	58%	4.85 (85)	5	10	—	✓	★★★★	★★	★★
Comp 11	\$119,696	\$605	55%	5 (111)	5	10	—	—	★★	★★	★
Comp 12	\$97,543	\$692	41%	4.9 (213)	5	10	—	✓	★★	★★	★★
Comp 13	\$77,672	\$642	39%	New (0)	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

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

MEDIAN REVENUE

Bedrooms	50th	60th	70th	80th	90th
3 bed	\$66,832	\$73,294	\$83,683	\$93,461	\$112,915
4 bed	\$111,816	\$120,080	\$129,134	\$166,585	\$216,495
5 bed	\$154,279	\$195,921	\$215,939	\$233,477	\$276,155

LIFT VS. THE 50TH PERCENTILE

Bedrooms	50th	60th	70th	80th	90th
3 bed	0%	10%	25%	40%	69%
4 bed	0%	7%	15%	49%	94%
5 bed	0%	27%	40%	51%	79%

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 69% 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.