

Q3 2026 Market Analysis

Sebastopol · Sonoma County, California

Twelve months of demand and supply data for the Sebastopol 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.**



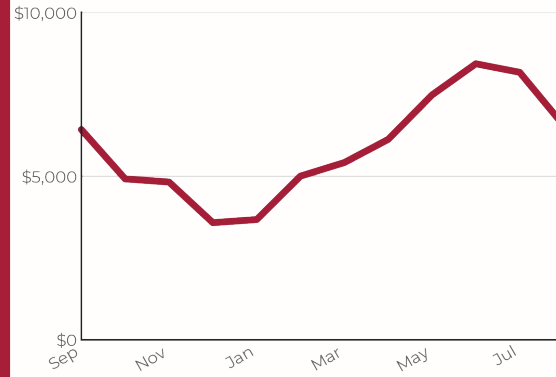
We're data nerds. We really enjoy digging into and tracking metrics to maximize performance.



We actually love what we do.

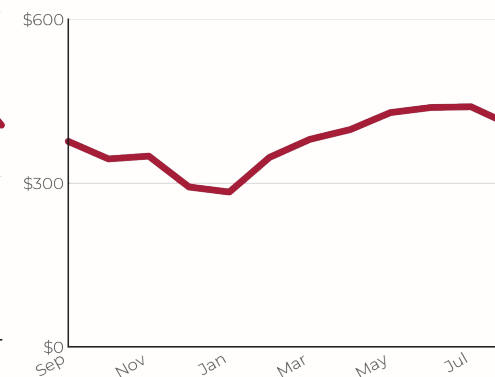
Sebastopol Market Snapshot

Demand Metrics



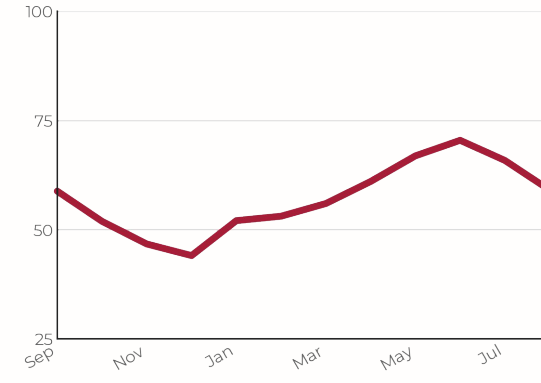
Revenue

Annual (YoY): \$71K(+6%)
Sep'26 / Sep'25 : (+12%)



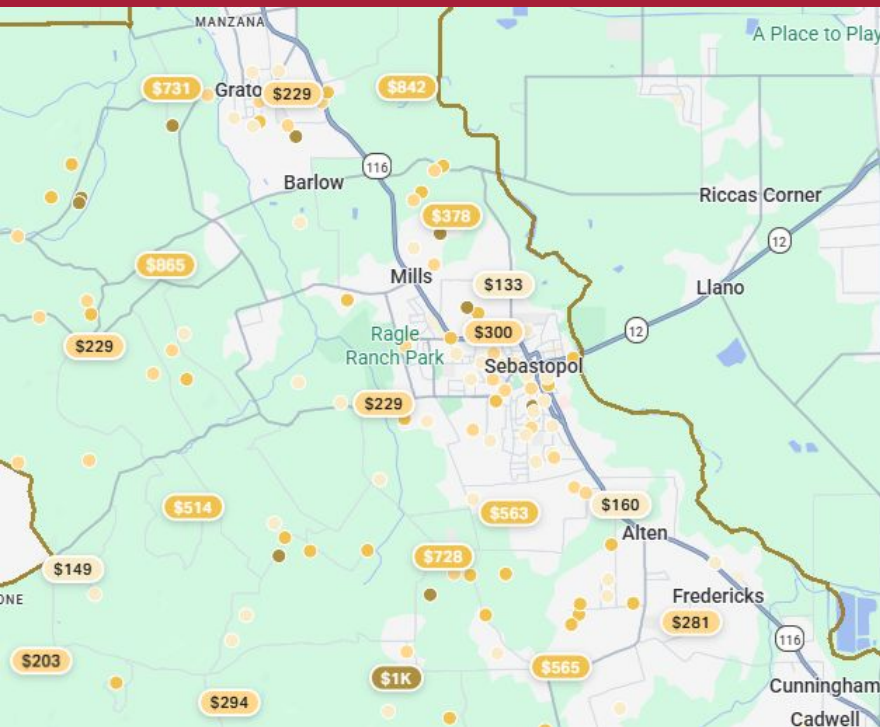
ADR

Annual (YoY): \$384 (+6%)
Sep'26 / Sep'25 : (+10%)

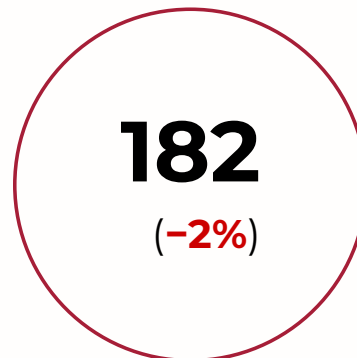


Occupancy

Annual (YoY): 58% (+1%)
Sep'26 / Sep'25 : (+6%)

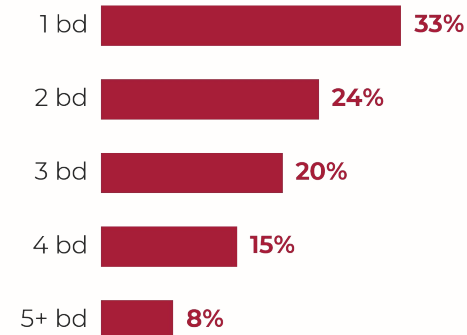


Active Listings

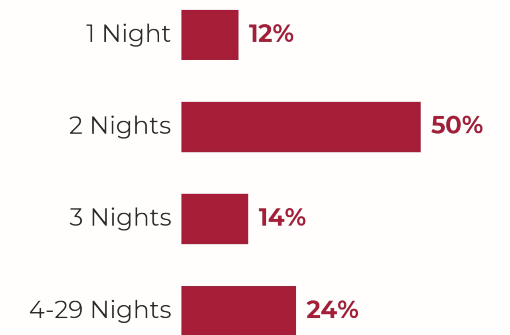


Supply Metrics

Listings by Bedroom



Listing by Min Stay



3 BRs that sleep 6–8

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

Sebastopol comps (linked)	Revenue	ADR	Occ	Rating (#)*	# BRs	Sleeps	Pool	Hot tub	Views	Arch. & design	Photos & listing
Comp 1	\$125,249	\$696	53%	5 (32)	3	6	—	—	★★	★★	★★
Comp 2	\$121,425	\$496	71%	5 (70)	3	8	—	✓	★★	★★	★★
Comp 3	\$117,104	\$751	51%	4.95 (99)	3	8	✓	✓	★★★★	★★	★★
Comp 4	\$110,167	\$706	49%	5 (59)	3	8	✓	✓	★★	★	★★
Comp 5	\$93,360	\$502	53%	4.8 (51)	3	8	✓	✓	★★	★★	★★
Comp 6	\$93,019	\$679	45%	5 (62)	3	6	—	✓	★	★★	★
Comp 7	\$92,649	\$850	38%	4.9 (75)	3	8	✓	✓	★★	★★	★★
Comp 8	\$89,739	\$339	74%	5 (79)	3	6	—	—	★★	★★	★★
Comp 9	\$89,022	\$864	34%	5 (30)	3	8	✓	✓	★★	★	★★
Comp 10	\$87,565	\$811	34%	4.95 (104)	3	6	✓	✓	★★	★★	★★
Comp 11	\$82,679	\$759	35%	4.9 (170)	3	8	✓	✓	★	★★	★
Comp 12	\$80,222	\$309	83%	4.95 (168)	3	6	—	—	★★	★★	★★
Comp 13	\$78,739	\$515	64%	4.8 (16)	3	8	✓	✓	★★	★★	★★
Comp 14	\$78,239	\$555	42%	5 (46)	3	6	—	—	★	★★	★★
Comp 15	\$77,091	\$617	36%	4.9 (110)	3	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

4 BRs that sleep 8

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

Sebastopol comps (linked)	Revenue	ADR	Occ	Rating (#)*	# BRs	Sleeps	Pool	Hot tub	Views	Arch. & design	Photos & listing
Comp 1	\$228,486	\$1,828	44%	4.85 (12)	4	8	✓	✓	★★★★	★★	★★
Comp 2	\$161,248	\$726	64%	4.95 (69)	4	8	—	—	★★★★	★★	★★
Comp 3	\$159,922	\$1,666	29%	4.95 (48)	4	8	✓	✓	★★★★	★★	★★
Comp 4	\$122,885	\$878	42%	4.9 (156)	4	8	✓	✓	★★★★	★★	★★
Comp 5	\$108,872	\$825	56%	4.95 (132)	4	8	✓	✓	★★★★	★★	★★
Comp 6	\$108,827	\$899	35%	4.9 (130)	4	8	✓	✓	★★	★★	★★
Comp 7	\$104,697	\$560	60%	4.85 (78)	4	8	—	✓	★★	★★	★★
Comp 8	\$103,339	\$698	61%	4.95 (28)	4	8	—	✓	★★★★	★	★★
Comp 9	\$94,258	\$703	42%	5 (44)	4	8	—	✓	★★★★	★★	★★
Comp 10	\$90,431	\$565	45%	4.95 (74)	4	8	—	✓	★★★★	★★	★★
Comp 11	\$81,953	\$836	49%	4.95 (17)	4	8	✓	✓	★★	★	★
Comp 12	\$76,645	\$389	69%	4.95 (28)	4	8	—	✓	★★★★	★★	★★
Comp 13	\$70,263	\$689	33%	5 (329)	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+

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

Sebastopol comps (linked)	Revenue	ADR	Occ	Rating (#)*	# BRs	Sleeps	Pool	Hot tub	Views	Arch. & design	Photos & listing
Comp 1	\$216,466	\$1,216	49%	4.95 (192)	5	12	✓	✓	★★★	★★	★★
Comp 2	\$198,020	\$1,269	43%	4.9 (117)	5	12	✓	✓	★★★	★★	★★
Comp 3	\$148,250	\$1,482	34%	5 (5)	5	10	—	—	★★	★★	★★
Comp 4	\$140,332	\$1,432	29%	4.75 (101)	5	16	—	✓	★★	★	★★
Comp 5	\$120,310	\$1,399	24%	4.95 (139)	5	16	—	✓	★★	★★	★
Comp 6	\$116,218	\$1,107	30%	5 (134)	5	10	✓	✓	★★	★	★★
Comp 7	\$101,265	\$739	39%	4.95 (227)	5	14	✓	—	★★	★★	★★

*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

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

MEDIAN REVENUE

Bedrooms	50th	60th	70th	80th	90th
3 bed	\$78,239	\$82,188	\$89,452	\$93,155	\$117,401
4 bed	\$94,258	\$104,697	\$108,872	\$159,922	\$162,983
5 bed	\$130,321	\$141,916	\$147,458	\$178,112	\$203,554

LIFT VS. THE 50TH PERCENTILE

Bedrooms	50th	60th	70th	80th	90th
3 bed	0%	5%	14%	19%	50%
4 bed	0%	11%	16%	70%	73%
5 bed	0%	9%	13%	37%	56%

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 50% 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.