

Q3 2026 Market Analysis

Sonoma County · California

Twelve months of demand and supply data across Sonoma County, 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**.

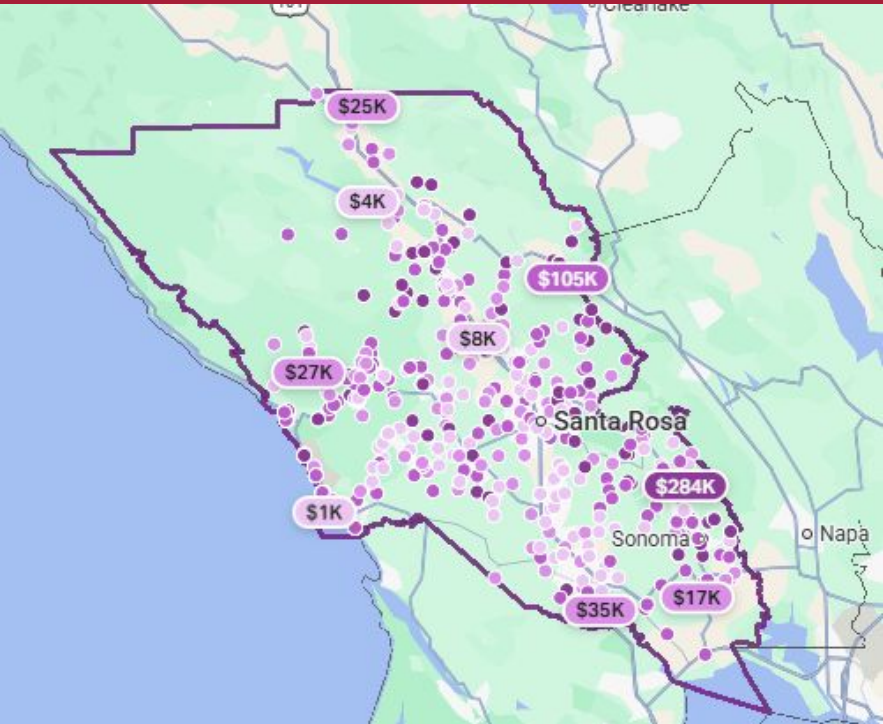


We're data nerds. We really enjoy digging into and tracking metrics to maximize performance.

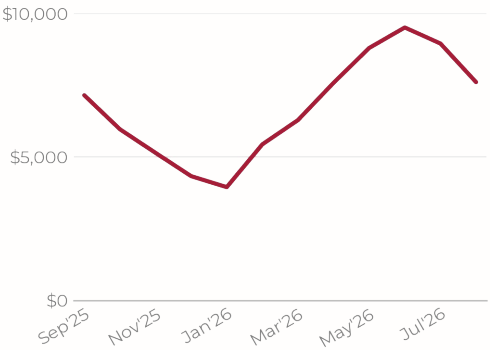


We actually love what we do.

Sonoma County Market Snapshot

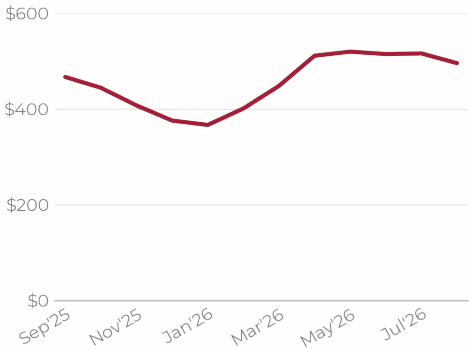


Demand Metrics



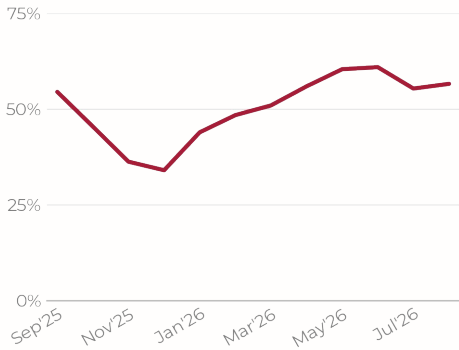
Revenue

Annual (YoY): \$80.6K (+5%)
Sep'26 / Sep'25 : (+9%)



ADR

Annual (YoY): \$469 (+2%)
Sep'26 / Sep'25 : (+4%)



Occupancy

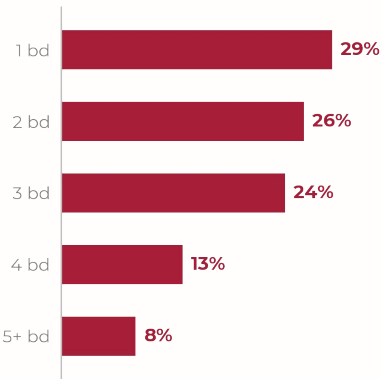
Annual (YoY): 54% (+2%)
Sep'26 / Sep'25 : (+6%)

Supply Metrics

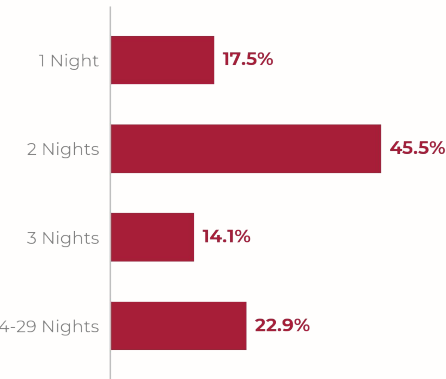
Active Listings



Listings by Bedroom



Listing by Min Stay



COMPETITIVE ANALYSIS

3 BRs that sleep 6

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

Sonoma County 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	\$261,138	\$978	84%	4.95 (103)	3	6	✓	✓	★★★★	★★	★★
Comp 3	\$237,142	\$1,325	55%	4.95 (71)	3	6	✓	✓	★★★★	★★	★★
Comp 4	\$235,685	\$1,295	59%	4.95 (170)	3	6	✓	✓	★★★★	★★	★★
Comp 5	\$217,544	\$980	70%	4.95 (61)	3	6	✓	✓	★★★★	★★	★★
Comp 6	\$206,426	\$791	73%	5 (154)	3	6	—	✓	★★★★	★★	★★
Comp 7	\$195,468	\$1,123	56%	5 (47)	3	6	✓	—	★★★★	★★	★★
Comp 8	\$192,481	\$631	88%	4.85 (130)	3	6	✓	✓	★★★★	★★	★★
Comp 9	\$191,020	\$1,248	47%	4.95 (108)	3	6	✓	✓	★★★★	★★	★★
Comp 10	\$180,483	\$771	69%	5 (197)	3	6	—	—	★★★★	★	★★
Comp 11	\$180,180	\$870	62%	5 (56)	3	6	✓	✓	★★★★	★★	★★
Comp 12	\$177,854	\$912	92%	5 (115)	3	6	✓	✓	★★★★	★	★
Comp 13	\$177,285	\$1,294	56%	4.9 (27)	3	6	✓	✓	★★★★	★★	★★
Comp 14	\$170,479	\$669	76%	4.95 (551)	3	6	✓	✓	★★	★★	★★
Comp 15	\$168,499	\$911	53%	5 (184)	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.

Sonoma County comps (linked)	Revenue	ADR	Occ	Rating (#)*	# BRs	Sleeps	Pool	Hot tub	Views	Arch. & design	Photos & listing
Comp 1	\$541,838	\$2,486	80%	5 (16)	4	8	✓	✓	★★	★★★	★★
Comp 2	\$421,655	\$3,765	47%	5 (38)	4	8	✓	—	★★★	★★	★★
Comp 3	\$386,408	\$2,647	47%	5 (48)	4	8	✓	✓	★★★	★★	★★
Comp 4	\$296,072	\$1,117	84%	4.95 (83)	4	8	✓	✓	★★★	★★	★★
Comp 5	\$285,827	\$1,553	53%	4.9 (212)	4	8	✓	✓	★★	★★	★★
Comp 6	\$283,577	\$1,157	72%	5 (50)	4	8	✓	✓	★★	★★	★★
Comp 7	\$277,718	\$1,089	88%	5 (348)	4	8	✓	✓	★★	★★	★★
Comp 8	\$270,508	\$1,470	55%	5 (39)	4	8	✓	✓	★★	★★	★★
Comp 9	\$268,568	\$1,105	73%	4.95 (113)	4	8	✓	—	★★	★★	★★
Comp 10	\$251,078	\$1,249	58%	5 (15)	4	8	✓	—	★★★	★★	★★
Comp 11	\$244,948	\$949	73%	4.9 (343)	4	8	✓	—	★★	★	★★
Comp 12	\$244,712	\$1,024	71%	5 (283)	4	8	✓	✓	★★★	★★	★★
Comp 13	\$242,008	\$1,658	44%	4.9 (35)	4	8	✓	✓	★★★	★	★★
Comp 14	\$242,005	\$2,373	43%	5 (17)	4	8	✓	—	★★	★★	★★
Comp 15	\$236,792	\$1,499	51%	4.95 (45)	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

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

Sonoma County comps (linked)	Revenue	ADR	Occ	Rating (#)*	# BRs	Sleeps	Pool	Hot tub	Views	Arch. & design	Photos & listing
Comp 1	\$869,410	\$6,166	42%	5 (1)	5	10	✓	—	★★★★	★★	★★
Comp 2	\$431,150	\$1,891	85%	5 (169)	5	10	✓	✓	★★★★	★★	★★
Comp 3	\$405,016	\$1,849	66%	5 (87)	5	10	✓	✓	★★★★	★★	★★
Comp 4	\$333,232	\$1,572	63%	5 (4)	5	10	✓	—	★★	★★	★★
Comp 5	\$316,738	\$1,616	60%	5 (32)	5	10	✓	✓	★★★★	★★	★★
Comp 6	\$301,985	\$2,083	50%	5 (103)	5	10	✓	✓	★★★★	★★	★★
Comp 7	\$296,238	\$1,504	63%	4.95 (108)	5	10	—	✓	★★★★	★★	★★
Comp 8	\$285,799	\$1,282	65%	4.9 (88)	5	10	✓	✓	★★★★	★★	★★
Comp 9	\$285,509	\$2,115	44%	5 (82)	5	10	✓	✓	★★★★	★★	★★
Comp 10	\$281,975	\$1,288	65%	4.85 (163)	5	10	✓	✓	★★★★	★★	★★
Comp 11	\$281,820	\$1,189	71%	4.95 (419)	5	10	✓	✓	★★★★	★★	★★
Comp 12	\$246,279	\$1,109	65%	4.9 (141)	5	10	✓	✓	★★★★	★★	★★
Comp 13	\$245,216	\$1,477	51%	4.9 (16)	5	10	—	✓	★★★★	★★	★★
Comp 14	\$226,337	\$1,572	49%	5 (84)	5	10	✓	—	★★★★	★★	★★
Comp 15	\$219,611	\$1,615	39%	5 (38)	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

Sonoma County, last twelve months of vacation rental performance. Source: AirDNA.

MEDIAN REVENUE

Bedrooms	50th	60th	70th	80th	90th
3 bed	\$75,052	\$84,791	\$97,016	\$109,496	\$131,340
4 bed	\$103,339	\$116,926	\$132,362	\$155,138	\$213,906
5 bed	\$150,437	\$170,888	\$198,795	\$238,744	\$300,836

LIFT VS. THE 50TH PERCENTILE

Bedrooms	50th	60th	70th	80th	90th
3 bed	0%	13%	29%	46%	75%
4 bed	0%	13%	28%	50%	107%
5 bed	0%	14%	32%	59%	100%

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 75% 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

Anish Patel · Head of Owner Relations

(707) 625-7139 · anish@viniferahomes.com · viniferahomes.com

Unreasonable hospitality.

Unrelenting standards.

Undeniable care.

©2026 Vinifera Homes · Proprietary and confidential.

Vinifera Homes