

Q3 2026 Market Analysis

Sonoma · Sonoma County, California

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



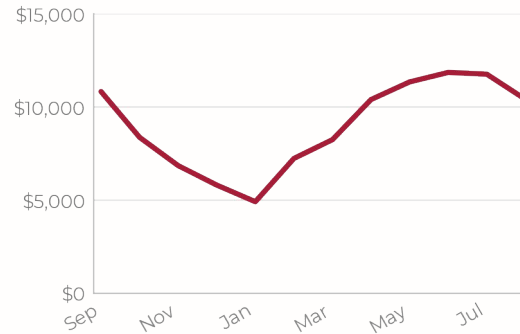
We're data nerds. We really enjoy digging into and tracking metrics to maximize performance.



We actually love what we do.

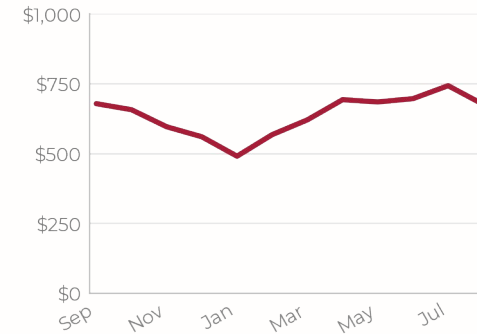
Sonoma Market Snapshot

Demand Metrics



Revenue

Annual (YoY): \$108K **(+3%)**
Sep'26 / Sep'25 : **(+2%)**



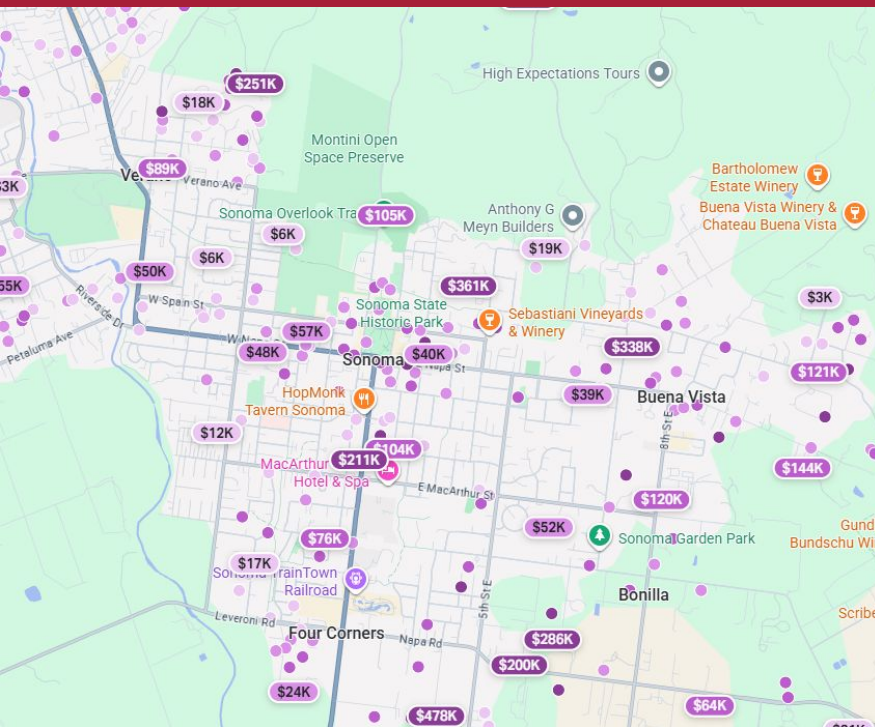
ADR

Annual (YoY): \$657 **(+3%)**
Sep'26 / Sep'25 : **(0%)**



Occupancy

Annual (YoY): 51% **(0%)**
Sep'26 / Sep'25 : **(+7%)**

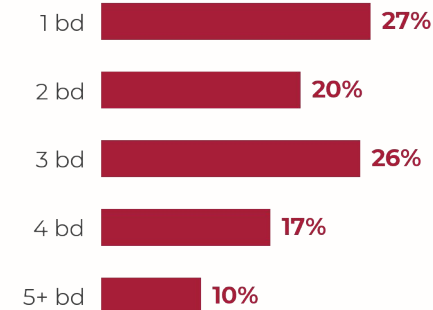


Active Listings

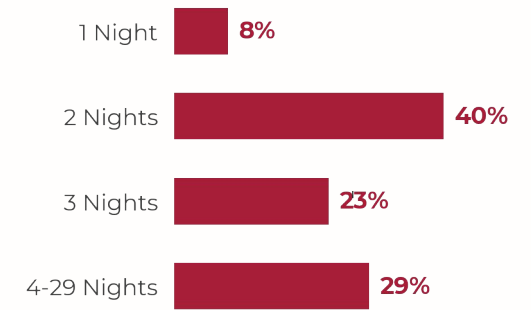
521
(-3%)

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.

Sonoma comps (linked)	Revenue	ADR	Occ	Rating (#)*	# BRs	Sleeps	Pool	Hot tub	Views	Arch. & design	Photos & listing
Comp 1	\$237,142	\$1,325	55%	4.95 (71)	3	6	✓	✓	★★★★	★★	★★★★
Comp 2	\$235,685	\$1,295	59%	4.95 (170)	3	6	✓	✓	★★	★★	★★
Comp 3	\$217,544	\$980	70%	4.95 (61)	3	6	✓	✓	★★★★	★★	★★
Comp 4	\$206,426	\$791	73%	5 (154)	3	6	—	✓	★★	★★	★★
Comp 5	\$191,020	\$1,248	47%	4.95 (108)	3	6	✓	✓	★★★★	★★	★★
Comp 6	\$170,479	\$669	76%	4.95 (551)	3	6	✓	✓	★★	★★	★★
Comp 7	\$161,536	\$629	84%	5 (179)	3	6	—	—	★★★★	★★	★★
Comp 8	\$146,104	\$683	61%	4.95 (224)	3	6	—	✓	★★	★★	★★
Comp 9	\$142,933	\$953	45%	5 (29)	3	6	✓	✓	★★★★	★	★★
Comp 10	\$131,340	\$912	55%	4.95 (128)	3	6	✓	✓	★★	★★	★★
Comp 11	\$127,422	\$724	55%	5 (76)	3	6	✓	✓	★★★★	★★	★★
Comp 12	\$126,006	\$881	45%	5 (5)	3	6	✓	✓	★★	★★	★★
Comp 13	\$118,338	\$661	57%	4.95 (37)	3	6	✓	✓	★★★★	★★	★★
Comp 14	\$114,140	\$878	53%	4.35 (6)	3	6	✓	✓	★★★★	★★	★★
Comp 15	\$112,854	\$627	51%	4.9 (151)	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 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	\$277,718	\$1,089	88%	5 (348)	4	8	✓	✓	★★	★★	★★
Comp 3	\$244,948	\$949	73%	4.9 (343)	4	8	✓	—	★★★★	★★	★★
Comp 4	\$244,712	\$1,024	71%	5 (283)	4	8	✓	✓	★★	★★	★★
Comp 5	\$242,008	\$1,658	44%	4.9 (35)	4	8	✓	✓	★★★★	★★★★	★★
Comp 6	\$219,824	\$1,110	65%	4.95 (76)	4	8	✓	✓	★★	★★	★★
Comp 7	\$219,526	\$1,464	45%	5 (1)	4	8	✓	✓	★★★★	★★	★★
Comp 8	\$207,578	\$1,996	32%	5 (9)	4	8	✓	✓	★★	★★	★★
Comp 9	\$191,146	\$1,648	45%	4.9 (208)	4	8	✓	—	★★	★★★★	★
Comp 10	\$167,760	\$1,485	42%	4.95 (36)	4	8	✓	✓	★★★★	★★	★★
Comp 11	\$165,072	\$1,603	35%	5 (227)	4	8	✓	—	★★★★	★★★★	★★
Comp 12	\$161,872	\$1,327	37%	5 (39)	4	8	✓	—	★★	★★	★★
Comp 13	\$155,796	\$986	77%	5 (21)	4	8	✓	✓	★★★★	★★★★	★
Comp 14	\$151,723	\$1,275	60%	5 (38)	4	8	✓	✓	★★	★	★★
Comp 15	\$143,548	\$1,148	54%	4.9 (294)	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 comps (linked)	Revenue	ADR	Occ	Rating (#)*	# BRs	Sleeps	Pool	Hot tub	Views	Arch. & design	Photos & listing
Comp 1	\$431,150	\$1,891	85%	5 (169)	5	10	✓	✓	★★★★	★★	★★★★
Comp 2	\$405,016	\$1,849	66%	5 (87)	5	10	✓	✓	★★	★★	★★
Comp 3	\$333,232	\$1,572	63%	5 (4)	5	10	✓	—	★★★★	★★	★★
Comp 4	\$316,738	\$1,616	60%	5 (32)	5	10	✓	✓	★★	★★	★★
Comp 5	\$301,985	\$2,083	50%	5 (103)	5	10	✓	✓	★★★★	★★	★★
Comp 6	\$296,238	\$1,504	63%	4.95 (108)	5	10	—	✓	★★	★★	★★
Comp 7	\$285,509	\$2,115	44%	5 (82)	5	10	✓	✓	★★★★	★★	★★
Comp 8	\$281,975	\$1,288	65%	4.85 (163)	5	10	✓	✓	★★	★★	★★
Comp 9	\$281,820	\$1,189	71%	4.95 (419)	5	10	✓	✓	★★★★	★★	★★
Comp 10	\$219,611	\$1,615	39%	5 (38)	5	10	✓	✓	★★★★	★★	★★
Comp 11	\$210,172	\$1,512	46%	5 (51)	5	10	✓	✓	★★	★★	★★
Comp 12	\$199,958	\$1,492	43%	4.95 (49)	5	10	—	✓	★★★★	★★	★★
Comp 13	\$170,735	\$880	68%	0 (0)	5	10	—	✓	★★★★	★★	★★
Comp 14	\$163,103	\$2,399	26%	5 (6)	5	10	—	✓	★★	★	★★
Comp 15	\$152,789	\$2,122	21%	4.95 (88)	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 city, last twelve months of vacation rental performance. Source: AirDNA.

MEDIAN REVENUE

Bedrooms	50th	60th	70th	80th	90th
3 bed	\$87,059	\$103,670	\$111,393	\$132,428	\$170,480
4 bed	\$135,311	\$150,329	\$169,620	\$216,812	\$244,901
5 bed	\$231,775	\$281,944	\$296,813	\$324,936	\$390,894

LIFT VS. THE 50TH PERCENTILE

Bedrooms	50th	60th	70th	80th	90th
3 bed	0%	19%	28%	52%	96%
4 bed	0%	11%	25%	60%	81%
5 bed	0%	22%	28%	40%	69%

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 96% 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.