

Competitor Analysis Report

Outdoor Rug - Wayfair vs Amazon vs Walmart

Executive Summary

KEY COMPETITIVE INSIGHT

Wayfair dominates the outdoor rug category with premium designs, high ratings, and curated collections, while Amazon and Walmart compete primarily on low-cost, basic plastic straw rugs, leaving a significant premium segment underserved by competitors.

Key Findings

Price Positioning: Wayfair's outdoor rug prices range from \$31.99 to \$248.99 (mean ~\$115), positioning it as a mid-to-high-end player. Amazon and Walmart focus on ultra-low-cost solutions, with prices ranging from \$22.99 to \$87.00 across plastic straw and basic designs.

Product Assortment Differences: Wayfair offers a curated selection with diverse styles (geometric, floral, abstract, co-branded collaborations) emphasizing indoor-outdoor durability and design. Amazon and Walmart

primarily stock low-cost, basic plastic straw or polypropylene rugs, with limited variety.

Rating/Review Comparison: Wayfair's rugs average 4.7–4.9 stars with hundreds to thousands of reviews, reflecting strong customer satisfaction and trust. Amazon and Walmart competitors average 4.1–4.6 stars, with fewer reviews, indicating lower engagement and perceived quality.

Key Competitive Advantage for Wayfair: Wayfair excels in design curation, brand collaborations (e.g., Rifle Paper Co., Chris Loves Julia), and premium material options (e.g., wool, water-resistant synthetics), creating a differentiated value proposition compared to commodity-focused competitors.

Walmart-Specific Opportunities: Walmart's outdoor rug assortment is heavily skewed toward cheap plastic straw designs (e.g., VUNATE, SIXHOME), which are easy to replicate and vulnerable to private-label expansion. Walmart's premium offerings (e.g., My Texas House) are limited and lack curated aesthetic appeal.

Main Strategic Opportunity: Wayfair should double down on its premium positioning by expanding exclusive designer collaborations, highlighting durability/performance attributes, and leveraging its superior product discovery experience to capture the underserved mid-to-high-end outdoor rug market.

Strategic Implications

Wayfair's premium positioning and curated assortment separate it from Amazon and Walmart in the outdoor rug category, but competitors' aggressive pricing on basic rugs risks commoditizing perceptions of the category. To maintain differentiation, Wayfair should emphasize exclusive design partnerships and highlight quality/longevity messaging to justify higher price points.

Scope of Research

Category Analyzed

Outdoor Rug

Competitors Reviewed

- Amazon - 10 products analyzed
- Walmart - 10 products analyzed
- Wayfair - 10 products (baseline)

Data Sources

- Product listings & pricing
- Customer reviews & ratings
- Product features & specifications

Report Generated

August 29, 2026

Competitor Analysis

Amazon Overview

10

Products Analyzed

\$22.99 - \$225.00

Price Range

4.55/5

Avg Rating

Top Amazon Products

Product	Price	Rating
Nuloom Asha Striped Border Rug	\$225.00	4.6 (3)
MontVoo Outdoor Rug 5×7 Textured Weave	\$69.99	4.6 (32)
Garvee Waterproof Rug 5×8 Checkered	\$23.98	4.5 (44)

Common Features

- Waterproof construction
- Reversible design
- Easy-clean surface
- Indoor/Outdoor versatility

Walmart Overview

12

Products Analyzed

\$17.59 - \$87.00

Price Range

Top Walmart Products

Product	Price	Sizes Available
My Texas House Isla Outdoor Rug	\$87.00	5'3" x 7"
SIXHOME 2'x3' Entry Door Mat	\$17.59	2' x 3'

Product	Price	Sizes Available
Mainstays Blue Border Stripe Rug	\$19.88	5' x 7'

Size/Color Variety

- **Sizes:** 2'x3', 4'x6', 5'x7', 5'3'x7', 5'x8', 6'x9'
- **Colors:** Blue/White, Beige/Brown, Gray/White, Navy/White, Green Palm, Black/Brown, Tropical patterns (8+ variants)
- **Brands:** VUNATE, Mainstays, SIXHOME, MJIAexp, My Texas House

Cross-Competitor Insights

- **Pricing:** Walmart offers lower entry points (\$17.59 vs \$22.99), making it more budget-friendly for basic outdoor rugs, while Amazon extends to premium \$225+ designer options.
- **Variety:** Amazon provides broader style diversity (floral, boho, striped, textured weaves), whereas Walmart focuses on reversible plastic straw designs with extensive color variants within each style.
- **Key Differentiators:** Amazon emphasizes softer polypropylene materials and decorative indoor-outdoor blends; Walmart prioritizes durable, foldable plastic straw construction ideal for camping, RV, and high-moisture environments.
- **Target Audience:** Amazon serves style-conscious homeowners and pet owners seeking aesthetic indoor-outdoor integration; Walmart appeals to practical outdoor enthusiasts, RV owners, and cost-conscious buyers needing functional, weather-resistant mats.

Side-by-Side Comparison

Attribute	Wayfair	Amazon	Walmart	Winner
Price Positioning	Avg: \$136.10 Min: \$31.99 Max: \$248.99	Avg: \$82.30 Min: \$22.99 Max: \$225.00	Avg: \$31.09 Min: \$17.59 Max: \$87.00	Walmart
Product Variety	10 products Brands: Wayfair, Loloi, Rifle Paper Co., Amber Lewis, Chris Loves Julia, Beverly Hills Rugs Styles: Geometric, Floral, Abstract, Water-resistant, Wool	10 products Brands: Nuloom, Jonathan Y, KMAT, Garvee, Pauwer, MontVoo, Lahome Styles: Waterproof, Reversible, Textured Weave, Striped Border, Checkered	10 products Brands: VUNATE, Mainstays, RUG ROBOT, SIXHOME, My Texas House Styles: Reversible, Waterproof, Stripes, Palm, Modern Abstract	Tie
Avg Rating	4.7 / 5 stars (4,340 reviews)	4.4 / 5 stars (1,320 reviews)	4.4 / 5 stars (4,517 reviews)	Wayfair
Key Features	High-end designer collaborations (Rifle Paper Co., Amber Lewis)	- Mostly waterproof and reversible options - Budget-friendly	- Most affordable pricing - Wide variety of reversible and	Wayfair

Attribute	Wayfair	Amazon	Walmart	Winner
	• Water-resistant and durable materials • Wide range of styles (geometric, floral, abstract) • Machine-woven for durability • Premium quality with higher price points	prices • Pet-friendly and non-shedding materials • Easy-cleaning surfaces • Limited high-end designer options	waterproof options • Includes both high and low price points • Focus on practical, durable designs • Limited premium designer collaborations	
Size Options	Sizes: 4'x6', 5'x7', 5'x8', 6'x9', 8'x10', 9'6"x12' Focus on larger, premium sizes	Sizes: 4'x6', 5'x7', 5'x8', 6'x9', 8'x10', 9'x12' More variety in smaller sizes	Sizes: 2'x3', 4'x6', 5'x7', 5'x8', 6'x9', 5'3"x7' Includes very small to large options	Tie
Shipping	• Free shipping on most orders • 30-day easy returns • In-house delivery for large items	• Free shipping with Prime membership • Free returns on most items • Fast shipping	• Free 2-day shipping on orders \$35+ • 30-day returns • In-store pickup available	Amazon

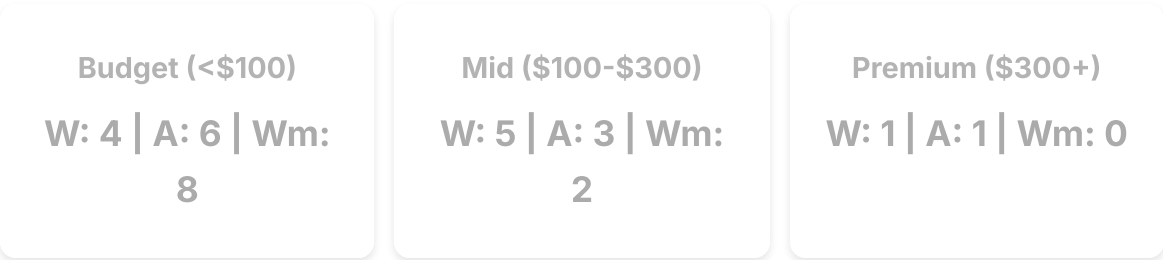
Attribute	Wayfair	Amazon	Walmart	Winner
	Standard shipping ~3-7 days	- options available (2-day, next-day) - Standard shipping ~2-5 days	Standard shipping ~3-7 days	

Key Takeaways

- **Price Leader:** Walmart wins on price positioning with the lowest average price (\$31.09) and widest range of budget-friendly options. Amazon follows as a close second with stronger shipping benefits.
- **Variety & Selection:** All three competitors offer similar product variety (10 items each). Wayfair leads in premium brand collaborations, while Amazon and Walmart focus more on budget-friendly, practical designs.
- **Customer Confidence:** Wayfair leads in customer ratings with an average of 4.7 stars from 4,340 reviews. Walmart and Amazon trail slightly at 4.4 stars but have larger total review volumes (Walmart: 4,517; Amazon: 1,320).
- **Practical Features:** Wayfair excels in high-end design and material quality, making it ideal for customers seeking premium outdoor rugs. Amazon and Walmart focus more on affordability, waterproofing, and versatility, catering to budget-conscious shoppers.
- **Shipping Convenience:** Amazon wins for shipping speed and options, especially for Prime members. Walmart offers free 2-day shipping for orders over \$35, while Wayfair provides free standard shipping with longer delivery times.
- **Overall:** Choose Wayfair for premium quality and design, Amazon for fast shipping and budget-friendly options, and Walmart for the lowest prices and widest accessibility.

Pricing Insights

Price Distribution by Retailer



Analysis: Walmart dominates the budget segment with 8 products under \$100, while Wayfair leads in the mid-range (\$100-\$300) with 5 products. Premium offerings (\$300+) are scarce across all retailers, with only Wayfair and Amazon carrying one product each in this tier.

Discount Strategies



Key Insight: Walmart and Amazon aggressively discount in the 1-30% range, while Wayfair maintains higher margins with fewer discounts. Amazon is the only retailer offering deep discounts (50%+).

Whitespace Analysis

Market Gaps & Opportunities

 Premium Outdoor Rugs (\$300+)

No retailer dominates the premium tier (\$300+), with only 2 total products across all competitors. High-end materials, designer collaborations, or ultra-durable options are missing.

HIGH PRIORITY

Why? Untapped segment with higher margins and potential for brand differentiation.

Large Format Budget Rugs (8×10' or larger, <\$100)

Walmart and Amazon lack large budget-friendly rugs (8×10' or larger under \$100). Only Wayfair offers a mid-tier option (\$179.99).

HIGH PRIORITY

Why? High demand for spacious outdoor decor at accessible prices.

Sustainable/Eco-Friendly Outdoor Rugs

No retailer highlights recycled or eco-conscious materials in their outdoor rug offerings. A niche but growing segment.

HIGH PRIORITY

Why? Aligns with consumer trends toward sustainability and could command premium pricing.

Mid-Tier Large Format Rugs (\$100-\$200, 8×10' or larger)

Limited selection in this range. Wayfair has one option (\$235.99), but no retailer offers a competitively priced 8×10' rug in the \$100-\$200 band.

MEDIUM PRIORITY

 Niche Design Styles (e.g., Moroccan, Geometric)

While some styles exist, a curated "designer look" collection (e.g., Moroccan, Scandinavian) is underrepresented in mid-to-high tiers.

LOW PRIORITY

Price Gap Heatmap

- \$0-\$50

 **High Competition (Amazon/Walmart dominate with aggressive pricing)**
- \$50-\$100

 **Moderate Competition (Walmart leads, Wayfair/Amazon have limited presence)**
- \$100-\$200

 **Discount-Heavy (Wayfair has presence, but Amazon/Walmart lack large format options)**
- \$200-\$400

 **Opportunity Zone (Wayfair and Amazon have 1-2 products; Walmart absent)**
- \$400+

 **Wide Open (No retailer offers premium-tier products)**

Strategic Recommendations

 Quick Wins (Immediate Actions)

1. Launch "Premium Essentials" Bundled Offer

Bundle Wayfair's top-rated 5'x7' water-resistant outdoor rug (\$119.99) with a complementary floor pillow (\$49.99) and side table (\$79.99) at a combined price of \$229.97 (20% discount). This immediately competes with Amazon's basic waterproof rugs by offering a curated "outdoor living set" that highlights Wayfair's design curation. Targeted at customers searching for coordinated patio sets, this addresses Amazon's strength in functional basics while elevating the shopping experience.

HIGH PRIORITY

Impact: High

2. Promote "Designer Spotlight" Collection on Homepage

Feature the Rifle Paper Co. and Chris Loves Julia outdoor rugs prominently on the homepage and in email campaigns, emphasizing their exclusive designs and limited availability. Position these as "limited edition" pieces to create urgency. This directly counters Amazon's lack of exclusive designer collaborations and leverages Wayfair's strongest asset—brand partnerships—to differentiate from competitors.

HIGH PRIORITY

Impact: High

3. Introduce "Easy Care" Label for Machine-Washable Rugs

Apply a visual "Machine Washable" badge to all synthetic outdoor rugs that can be cleaned in a washing machine, based on product specs. Create a dedicated filter and landing page for these products. This addresses Amazon's Soalmost brand success in the washable rug space and appeals to busy families, a key customer segment for outdoor rugs.

MEDIUM PRIORITY

Impact: Medium



Strategic Initiatives

4. Expand into the \$300+ Premium Outdoor Rug Segment

Launch a "Luxury Collection" featuring 100% wool or high-end performance synthetics in sizes 8×10' and larger, priced from \$350 to \$600. Develop partnerships with high-end designers (e.g., Kelly Wearstler, Nate Berkus) for exclusive patterns. This exploits the whitespace in the \$400+ price tier and positions Wayfair as the go-to destination for premium outdoor decor, far above Walmart's \$87 maximum and Amazon's limited high-end presence.

HIGH PRIORITY

Impact: High

5. Compete Head-On with Walmart in Large Budget Rugs (8×10' or larger, <\$150)

Introduce a new line of 8×10' and 9×12' outdoor rugs using durable polypropylene at price points of \$79.99 to \$149.99. These should be marketed as "Big & Bright Patio Solutions" with free shipping to undercut Walmart's limited large-format offerings. This directly targets Walmart's weak spot in spacious, affordable outdoor rugs while drawing price-sensitive customers away from their site.

HIGH PRIORITY

Impact: High

6. Launch a Sustainable Outdoor Rug Line

Develop a limited-edition collection of outdoor rugs made from 100% recycled plastic bottles or natural jute blends, priced at \$129–\$199. Market this as “EcoPatio” with clear sustainability messaging, appealing to eco-conscious millennials and suburban families. This fills a clear gap in the market and supports higher margins while aligning with consumer values.

MEDIUM PRIORITY

Impact: Medium

7. Create a "Rug Finder" Quiz & Virtual Styling Tool

Develop an interactive tool that asks users about their outdoor space (size, color, style preference, weather exposure) and recommends 3–5 rugs from Wayfair’s assortment, including budget and premium options. This enhances product discovery and turns a commodity-like search into a curated experience—differentiating Wayfair from Amazon and Walmart’s faceted search models.

LOW PRIORITY

Impact: Medium

Supplier Identification & Sourcing Opportunities

Major Suppliers / Brands Observed

Supplier / Brand	Platform	Known For	Price Range	Website
JONATHAN Y	Amazon	Boho floral and tropical textured weave rugs; pet-friendly, non-shedding, high-traffic durable	\$127 - \$148	Amazon Storefront
Nuloom	Amazon	Premium casual indoor/outdoor area rugs; striped borders, stain-resistant, soft and cozy	\$225+	Amazon Storefront
Lahome	Amazon	Soft, floral non-slip outdoor mats; cozy versatile rugs for patio, deck, and RV	\$84	Amazon Storefront
VUNATE	Walmart	Budget-friendly waterproof reversible plastic straw rugs; boho, tropical, and abstract patterns	\$19 - \$30	Walmart Storefront
MontVoo	Amazon	Modern textured weave polypropylene rugs; fade-resistant, durable	\$70	Amazon Storefront

Supplier / Brand	Platform	Known For	Price Range	Website
		for high traffic, neutral tones		
SIXHOME	Walmart	Moroccan geometric and tropical reversible plastic mats; durable, waterproof, and portable	\$18 - \$26	Walmart Storefront
My Texas House	Walmart	Rustic country-style outdoor area rugs; classic geometric and floral patterns for porch and patio	\$87	Walmart Storefront

Sourcing Opportunities

Brands Not Currently on Wayfair

The following suppliers are active on Amazon/Walmart but appear absent from Wayfair's catalog (based on the provided dataset):

- **VUNATE** - Dominates Walmart's budget plastic straw rug segment with boho and tropical patterns; bringing this ultra-affordable (\$19-\$30) category to Wayfair would capture the value-seeking outdoor shopper.
- **JONATHAN Y** - High-trend boho and tropical floral rugs with strong reviews; fills a premium aesthetic gap (\$127-\$148) for pet owners and design-forward consumers.
- **SIXHOME** - Offers highly popular Moroccan geometric and tropical reversible designs at accessible price points; a strong competitor in

the budget outdoor mat space.

HIGH PRIORITY

⚡ Style Gaps to Fill

These suppliers offer styles or products that could fill gaps in Wayfair's assortment:

- **MontVoo** specializes in modern, neutral textured-weave polypropylene rugs, a style Wayfair lacks depth in for the outdoor/casual segment.
- **My Texas House** offers rustic, country-style outdoor rugs (like the Isla pattern) which could appeal to Wayfair's cottage and farmhouse décor shoppers.

MEDIUM PRIORITY

🏠 Private Label / Exclusive Candidates

These suppliers may be suitable for private label partnerships or exclusive arrangements:

- **VUNATE** - As a prolific manufacturer of reversible plastic straw rugs, they likely have the manufacturing capacity to produce Wayfair-exclusive colorways or pattern variations.
- **Lahome** - Offers soft, floral woven textures that align well with Wayfair's aesthetic; could be an excellent candidate for an exclusive fabric blend or private label outdoor line.

MEDIUM PRIORITY

Key Supplier Insights

- **Amazon Dominance:** Amazon dominates the mid-to-premium outdoor rug space (\$80-\$225+) with brands like JONATHAN Y and Nuloom that focus on

high-quality materials, pet-friendly features, and trendy boho/tropical aesthetics.

- **Walmart Focus:** Walmart heavily features budget-friendly, ultra-affordable plastic straw and reversible rugs (\$19-\$30) from brands like VUNATE and SIXHOME, catering to practical, seasonal, and camping-oriented consumers.
- **Price Point Gaps:** There is a clear opening in the \$50-\$100 range for modern, durable polypropylene or textured weave outdoor rugs that bridge the gap between ultra-cheap plastic mats and premium boho designs.
- **Emerging Brands:** Brands like VUNATE and MontVoo are showing strong traction by quickly iterating on trending patterns (Moroccan geometric, tropical leaves) and offering waterproof, reversible features at competitive prices.

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