

# Mass Merchandisers – US – 2022

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## This report looks at the following areas:

- The impact of inflationary pressures on consumer behavior and mass merchandisers
- Perceptions of mass merchandisers relative to other major retailers
- Motivations and occasions driving consumers to shop in mass merchandisers
- Attitudes and behaviors toward shopping in mass merchandisers
- How mass merchandisers can invest in and improve the omnichannel shopping experience

Dominated by Walmart and Target, mass merchandisers continue to gain retail market share, and nearly all consumers shop them for the appeal of one-stop shopping at value prices. Unlike other retailers, mass merchandisers saw record sales growth throughout the pandemic era, benefiting from consumers' increased focus on essential categories, affordable prices and flexible shopping options. In spite of record sales, mass merchandisers have faced their share of challenges. As inflationary pressures continue to mount, consumers have shifted their purchases away from higher-margin categories such as clothing, reducing overall profits. Coupled with supply chain snarls and setbacks, these fluctuations in consumer demand have resulted in massive pileups of unsold inventory, resulting in aggressive discounting and further drains on profits.

Looking ahead, mass merchandisers are expected to see continued growth despite economic challenges as consumers turn to mass retailers as a way to save money on essentials. In this environment, delivering a strong value proposition centered on both savings and convenience will be critical. However, competition will be steep from discount and dollar outlets and the sector's largest ecommerce competitor, Amazon. While mass merchandisers have invested in improvements to the ecommerce experience, consumers continue to prefer shopping mass merchandisers in-store. Outside of competing on price, omnichannel capabilities, quality store brands and an



“Consumers are drawn to mass merchandisers for the appeal of one-stop shopping and overall value. Outside of price, convenience is king, and mass merchandisers will be uniquely positioned to deliver flexible shopping experiences in an omnichannel future.”

– **Brittany Steiger, Senior Analyst – Retail & eCommerce**

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enjoyable in-store experience will be important differentiators that will set mass merchandisers apart from their competitors.

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