



Mass Merchandisers - US - 2022

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

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

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

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



What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

OVERVIEW

- **What you need to know**
- **This Report looks at the following areas**
- **Definition**
- **Market context**

EXECUTIVE SUMMARY

- **Top takeaways**
- **Market overview**

Figure 1: Total US sales and fan chart forecast of mass merchandisers, at current prices, 2017-27

Figure 2: Outlook for mass merchandisers, 2022-27

- **Opportunities and challenges**
- **Economic pressures shift the focus to value and savings**
- **In-store shopping makes a comeback, but multichannel is the future**
- **Grocery and essentials are winning in mass**
- **Key consumer insights**

MARKET SIZE AND FORECAST

- **Continued sales growth in spite of headwinds**

Figure 3: Total US sales and fan chart forecast of mass merchandisers, at current prices, 2017-27

Figure 4: Total US sales and forecast of mass merchandisers, at current prices, 2016-26

SEGMENT PERFORMANCE

- **Supercenters and warehouse clubs dominate market share**

Figure 5: Total US retail sales and forecast of mass merchandisers, by segment, at current prices, 2017-27

Figure 6: Total US revenues of mass merchandisers, by segment, at current prices, 2020 and 2022

MARKET FACTORS

- **Economic pressures drive consumers toward low prices**

Figure 7: Consumer Price Index change from previous period, 2007-22

- **Retailers grapple with inventory pileups**
- **Conscious consumerism is on the rise**
- **Tech advancements solidify an omnichannel future**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

COMPETITIVE STRATEGIES AND MARKET OPPORTUNITIES

- Target bets on brick-and-mortar**
Figure 8: Target expands its in-store strategy
- Walmart lays the groundwork for an omnichannel future**
Figure 9: Walmart invests in omnichannel
- Meijer makes sustainability a priority**
Figure 10: Meijer invests in sustainability and community

THE MASS MERCHANTISER CONSUMER – FAST FACTS

RETAILERS SHOPPED AND SHOPPING METHOD

- Walmart and Target continue to dominate**
Figure 11: Retailers shopped – Mass merchandisers, by shopping method, 2022
- Despite ecommerce growth, in-store is the preferred channel for mass**
Figure 12: Retailers shopped online – Mass merchandisers, 2015-22
- Walmart makes enhancements to Walmart.com**
Figure 13: Walmart makes enhancements to Walmart.com
- How do mass merchandisers hold up against other major retailers?**
- Club stores outpace Meijer and Kmart**
Figure 14: Retailers Shopped, mass merchandisers versus warehouse/club, by shopping method, 2022
- Amazon continues to own ecommerce**
Figure 15: Retailers shopped online, 2022
- Amazon introduces its "Amazon Style" store**
Figure 16: Amazon introduces its "Amazon Style" store
- Parents are a key demographic for mass merchandisers across channels**
Figure 17: Mass merchandisers shopped online, by parental status and gender, 2022

ITEMS PURCHASED AT MASS MERCHANTISERS

- Consumers look to mass merchants for essential purchases**
Figure 18: Items purchased at mass merchandisers – Any purchase, 2022
- Food and beverage are winning in the mass channel**
Figure 19: Items purchased at mass merchandisers – Any food/beverage – NET, by age and household income, 2022
- Mass merchandisers are becoming beauty destinations**
Figure 20: Items purchased at mass merchandisers, beauty – Females, by race and Hispanic origin, 2022
- Target expands beauty partnerships**
Figure 21: Target expands beauty partnerships
- Young and middle-aged consumers are driving discretionary categories**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



Figure 22: Select items purchased at mass merchandisers, by gender and age, 2022

PRIVATE LABEL PURCHASE HABITS

- Consumers are trading into store brands**

Figure 23: Items purchased at mass merchandisers – Store brands, 2022

- Millennials drive store brand purchases across categories**

Figure 24: Items purchased at mass merchandisers – Store brands, by generation, 2022

- Quality store brands are a key differentiator**

Figure 25: Reasons for shopping mass merchandisers – Store brands, by household income 2022

Figure 26: Walmart "duples" on TikTok

- Asian Americans want higher quality store brands**

Figure 27: Desire for higher quality store brands, by race and Hispanic origin, 2022

REASONS FOR SHOPPING MASS MERCHANDISERS

- Affordable prices and wide assortment drive consumers toward mass merchandisers**

Figure 28: Reasons for shopping mass merchandisers, by generation, 2022

Figure 29: Walmart collaborates with United Health Group to provide value-based healthcare services to seniors

- Parents seek flexible and convenient one-stop shopping**

Figure 30: Select reasons for shopping mass merchandisers, by gender and parental status, 2022

Figure 31: Target adds Starbucks to its "Drive Up" service

- Urban shoppers crave a high-quality shopping experience**

Figure 32: Select reasons for shopping mass merchandisers, by location, 2022

Figure 33: Target opens new small-format store in Times Square

SHOPPING OCCASIONS

- Consumers look to mass merchandisers as grocers and essential retailers**

Figure 34: Shopping occasions, 2022

Figure 35: Meijer launches new small-format "Meijer Grocery" concept

- Parents shop for more occasions**

Figure 36: Select shopping occasions, by gender and parental status, 2022

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 37: "Walmart Land" on Roblox

- **Consumers treat themselves for fun**

Figure 38: Shopping occasions – Just for fun, by key consumer groups, 2022

PERCEPTIONS OF MASS MERCHANTISERS

- **Mass merchandisers lead on value, but trail Amazon**

Figure 39: Perceptions of mass merchandisers versus Amazon.com, 2022

- **Target has mastered the budget-to-quality ratio**

Figure 40: Perceptions of mass merchandisers, value concepts, 2022

- **Still a long way to go on corporate social responsibility**

Figure 41: Perceptions of mass merchandisers, corporate social responsibility, 2022

- **Black consumers put their trust in Walmart**

Figure 42: Perceptions of Walmart, by race, 2022

Figure 43: Walmart's "Black and Unlimited" campaign

ATTITUDES TOWARD MASS MERCHANTISERS

- **Consumers crave convenient, enjoyable shopping experiences**

Figure 44: Attitudes toward mass merchandisers- shopping experience, by gender and age, 2022

Figure 45: Walmart + Netflix "Stranger Things" experience

- **Consumers are increasingly guided by their values**

Figure 46: Attitudes toward mass merchandisers – Conscious consumerism, by generation, 2022

- **Budget-conscious behaviors extend across income brackets**

Figure 47: Attitudes toward mass merchandisers – Budget/ value, by age and household income, 2022

- **Social commerce continues to build momentum**

Figure 48: Attitudes toward mass merchandisers – Social media, by key demographics, 2022

- **Consumers need to see the benefit of paid membership programs**

Figure 49: Attitudes toward mass merchandisers – Paid memberships, by generation, 2022

DESIRED IMPROVEMENTS

- **Value concepts top the wishlist**

Figure 50: Desired improvements, 2022

Figure 51: TURF analysis – Desired improvements, 2022

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Younger consumers want more out of their shopping experience**

Figure 52: Desired improvements, shopping experience, by generation, 2022

- **Multicultural consumers find more room for improvement**

Figure 53: Select Desired improvements, by race and Hispanic origin, 2022

APPENDIX – DATA SOURCES AND ABBREVIATIONS

- **Data sources**
- **Sales data**
- **Forecast**
- **Consumer survey data**
- **Abbreviations and terms**
- **Abbreviations**

APPENDIX – THE MARKET

Figure 54: Total US revenues and forecast of mass merchandisers, at inflation-adjusted prices, 2017-27

Figure 55: Total US revenues and forecast of supercenters and warehouse club stores, at inflation-adjusted prices, 2017-27

Figure 56: Total US revenues and forecast of discount department stores, at inflation-adjusted prices, 2017-27

APPENDIX – THE CONSUMER

Figure 57: Mass Merchandisers shopped – Any purchase (NET), by household income, 2022

Figure 58: Mass merchandisers shopped – Any purchase (NET), by parental status and gender, 2022

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster.

Our purpose is to help businesses and people grow. To find out how we do that, visit mintel.com.