

THE FUTURE OF WATER, SPORTS AND ENERGY DRINKS: 2023

Enhanced hydration is inspiring innovation as energy drinks opt for a more gender-neutral appeal and Liquid Death's gory genius goes global.



Alex Beckett, Director -
Mintel Food & Drink



Report Content



- Meet Mintel's water, sports and energy drinks expert

WHAT YOU NEED TO KNOW

- Where we are now
- In the next two years
- In five years and beyond

THE NEXT TWO YEARS

- Mintel's perspective

Valued as essentials, bottled water and energy drinks will continue to premiumise

- The value of bottled water and energy drinks as 'essentials' will only intensify for consumers
- Bottled water will straddle both essential needs and aspirational lifestyle needs
- Premium energy drinks will extend usage with gender-neutral branding and relevant wellness boosts
- Energy drink brands distance themselves from an overtly masculine image

Hydration innovation will flourish, buoyed by extreme weather events and the need for productivity and healthy ageing

- Hydration will accelerate and diversify as a marketing and innovation theme
 - Graph 1: interest in 'superior hydration' as a bottled water functional benefit, any rank, by fitness level, 2022
- Electrolytes are crucial currency in the hydration wars
- How hydration innovation will stay relevant to consumers' needs
- As temperatures soar, electrolyte drinks will be more appropriate than sports drinks
- Over-hydration, as well as dehydration, presents a need for electrolyte balance

The Liquid Death legacy: don't be so serious and spark some joy

- Liquid Death's lucrative rule-breaking ethos inspired a community
- Liquid Death: 'humans are tired of mindless, self-serving marketing'
- Liquid Death's eco-aware yet heavy metal swagger is emulated by other brands...
- It's a dude thing: male Millennials and young dads associate water brands with status
 - Graph 2: agreement with the statement 'premium bottled water can act as a status symbol,' by select demographics, 2022
- Status-symbol brands can build communities and help consumers express themselves
- Three misconceptions that energy, sports and bottled water brands can build rebel communities around

IN FIVE YEARS AND BEYOND

- Mintel's perspective

Finally, a cohort of seniors is emerging that can be a lucrative user group for bottled water

- Compared with over-65s, the incoming generation of seniors represents exciting potential for fortified waters
- The incoming senior cohort of 55-64 year olds can spark opportunities for waters with age-related benefits
 - Graph 3: agreement with the statement 'drinking fortified water (eg with added vitamins/minerals) is a good way to boost your intake of vitamins/minerals', by select age groups, 2022
- Whether it's regular bottled water or flavoured sparkling water, usage is stronger among under-65s
 - Graph 4: usage of flavoured sparkling water, by age group, 2022
 - Graph 5: any packaged water consumption, by age, 2022
- What health features do seniors particularly want to see in bottled waters?
- In the US, the functional preferences of 55-64 year olds do not significantly differ from the average
 - Graph 6: appealing functional water claims, by age group, 2022

The rollout of weight-loss drugs will create new opportunities for isotonic drinks

- Weight-loss drugs are a pharmaceutical revolution, and have repercussions for hydration
- Side effects* of most popular weight-loss drugs
- The side effects of weight-loss drugs have repercussions for electrolyte drinks

Get ready for Generation Alpha, the kids of the 'Red Bull Generation' and an exciting bunch of pleasure-seekers

- Gen Alpha will be shaped by Millennial values and life lessons from the pandemic
- Gen Alpha is being coached to value new flavours and experiences and their independence
- Just as Gen Z kicked back against Millennials, Gen Alpha will rebuff Gen Z behaviours
- The kids of the 'Red Bull Generation', Gen Alpha will be conscious hedonists

Disclaimer

This is marketing intelligence published by Mintel. The consumer research exclusively commissioned by Mintel was conducted by a licensed market survey agent ([See Research Methodology for more information](#)).

Terms and Conditions of use

Any use and/or copying of this document is subject to Mintel's standard terms and conditions, which are available at <http://www.mintel.com/terms>

If you have any questions regarding usage of this document please contact your account manager or call your local helpdesk.

Published by Mintel Group Ltd

www.mintel.com

email: store@mintel.com

Help desk

UK	+44 (0)20 7778 7155
US	+1 (312) 932 0600
Australia	+61 (0)2 8284 8100
China	+86 (21) 6386 6609
India	+91 22 4090 7217
Japan	+81 (3) 6228 6595
Singapore	+65 (0)6 818 9850