

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.



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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

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