



DIAGEO Case Study Frankfurt Airport



Introduction

This case study demonstrates how Shelftrak provides brands with actionable insights into their in-store execution across various locations.

Objectives

1. Using total Europe as a benchmark, evaluate Diageo's performance across the Whisk(e)y category in Frankfurt Airport to identify key areas for improvement.
2. Highlight specific opportunities to enhance Diageo's brand presence and in-store execution across all key stores.
3. Benchmark Johnnie Walker shelf space, facings, category share, and positioning against competitors, pinpointing targeted growth opportunities.

Key Headlines

Diageo
Share Of Whisk(e)y In FRA

37%
LOWER

Than The
European Average

Johnnie Walker
Share Of Blended Scotch

35%
LOWER

Than The
European Average

Diageo
Single Malt Share In FRA T2

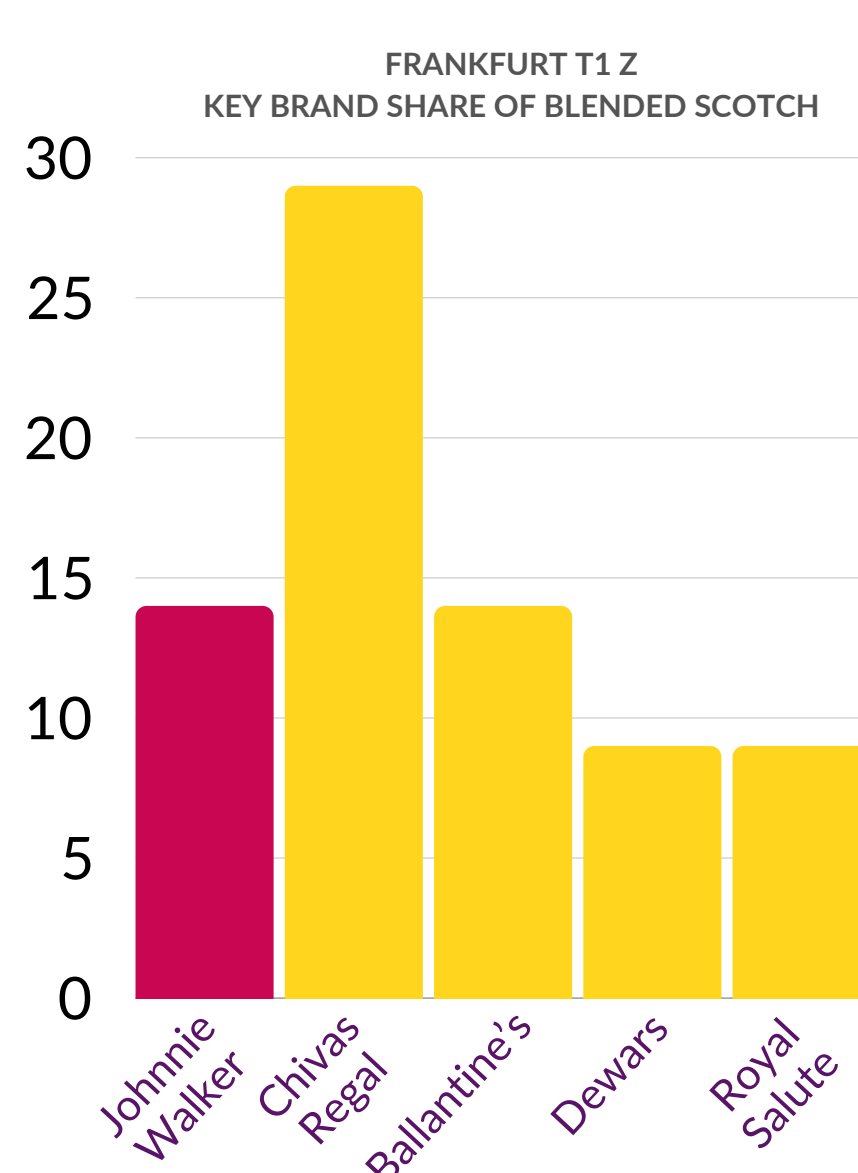
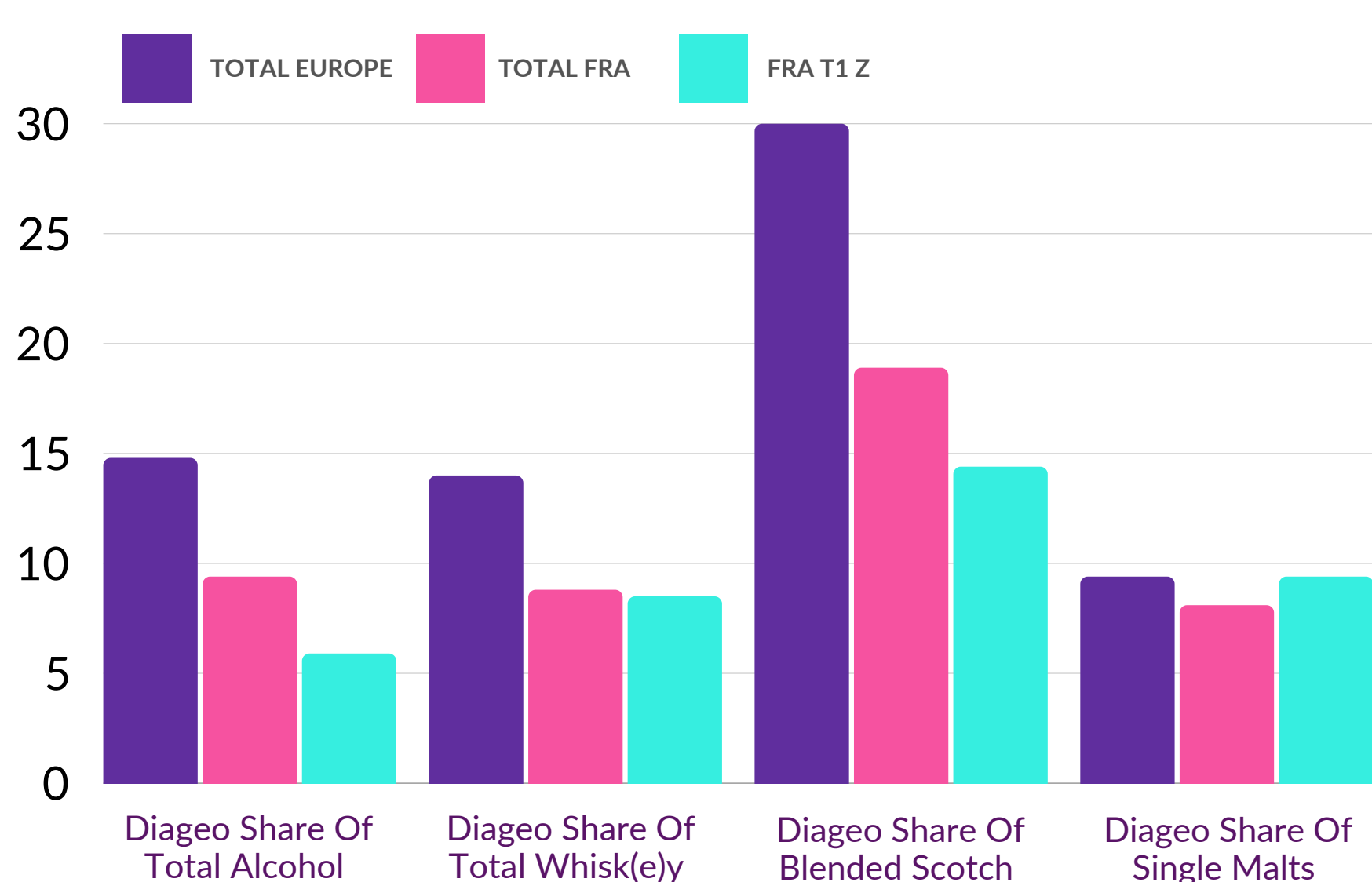
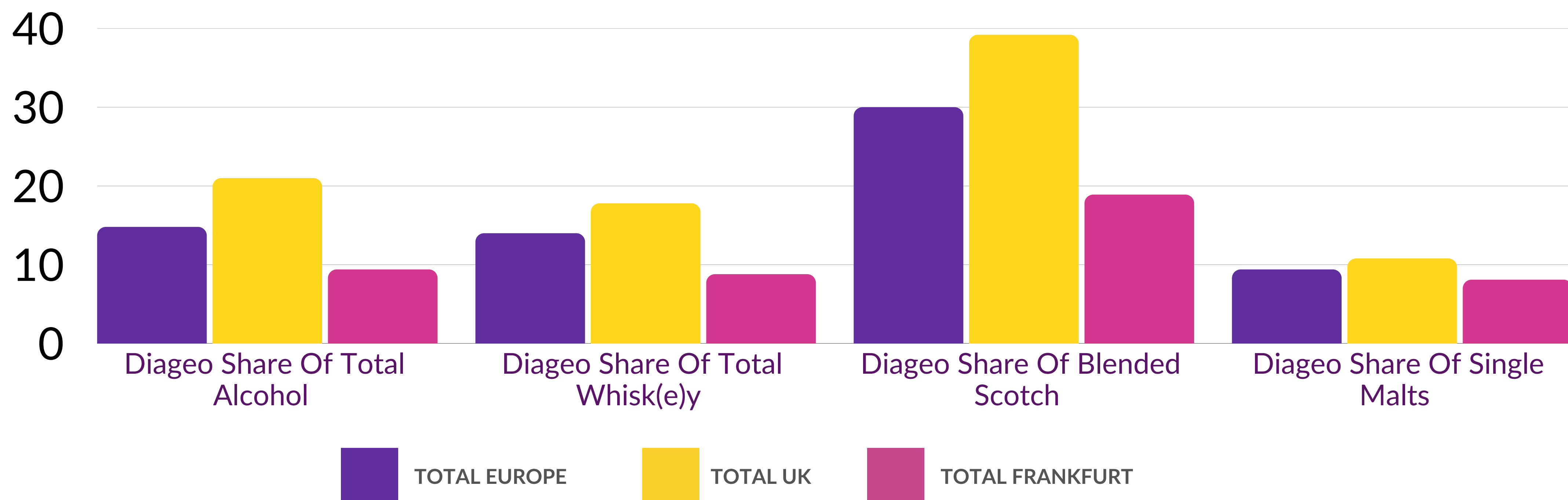
52%
LOWER

Than The
European Average

Analysis

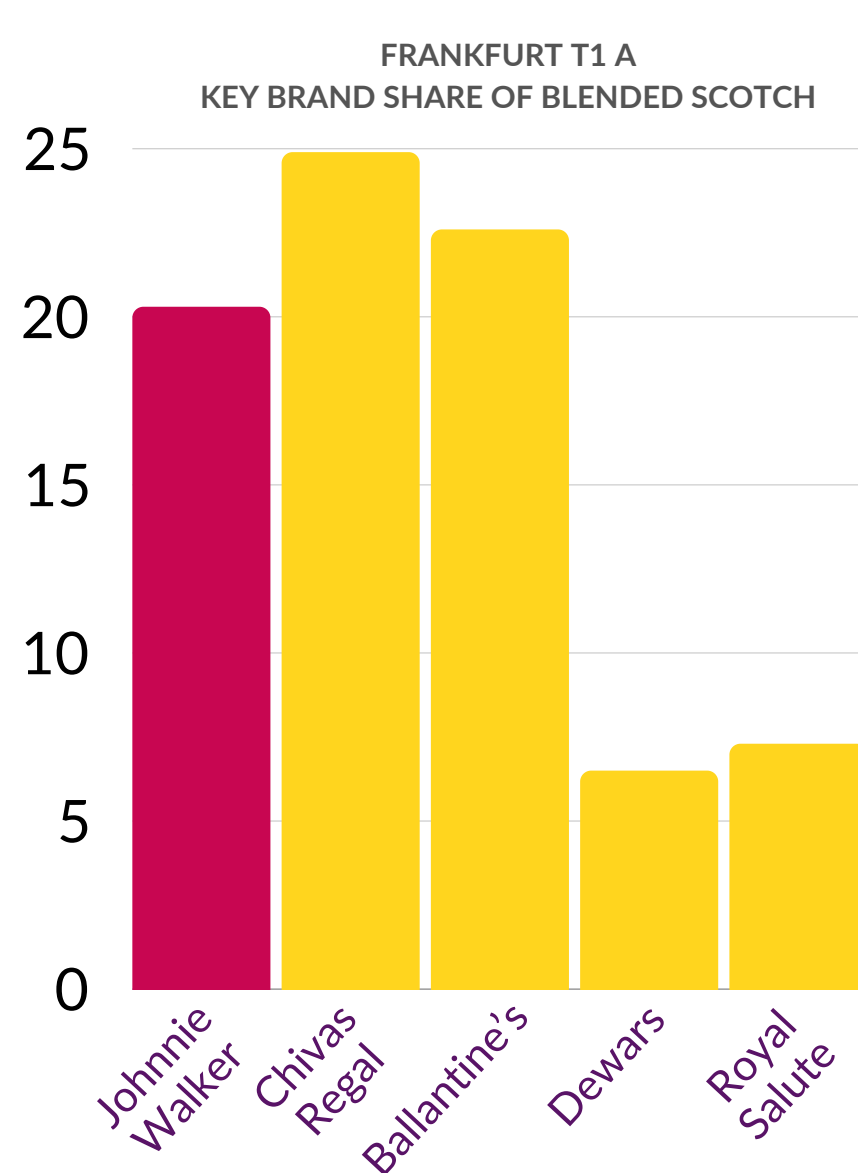
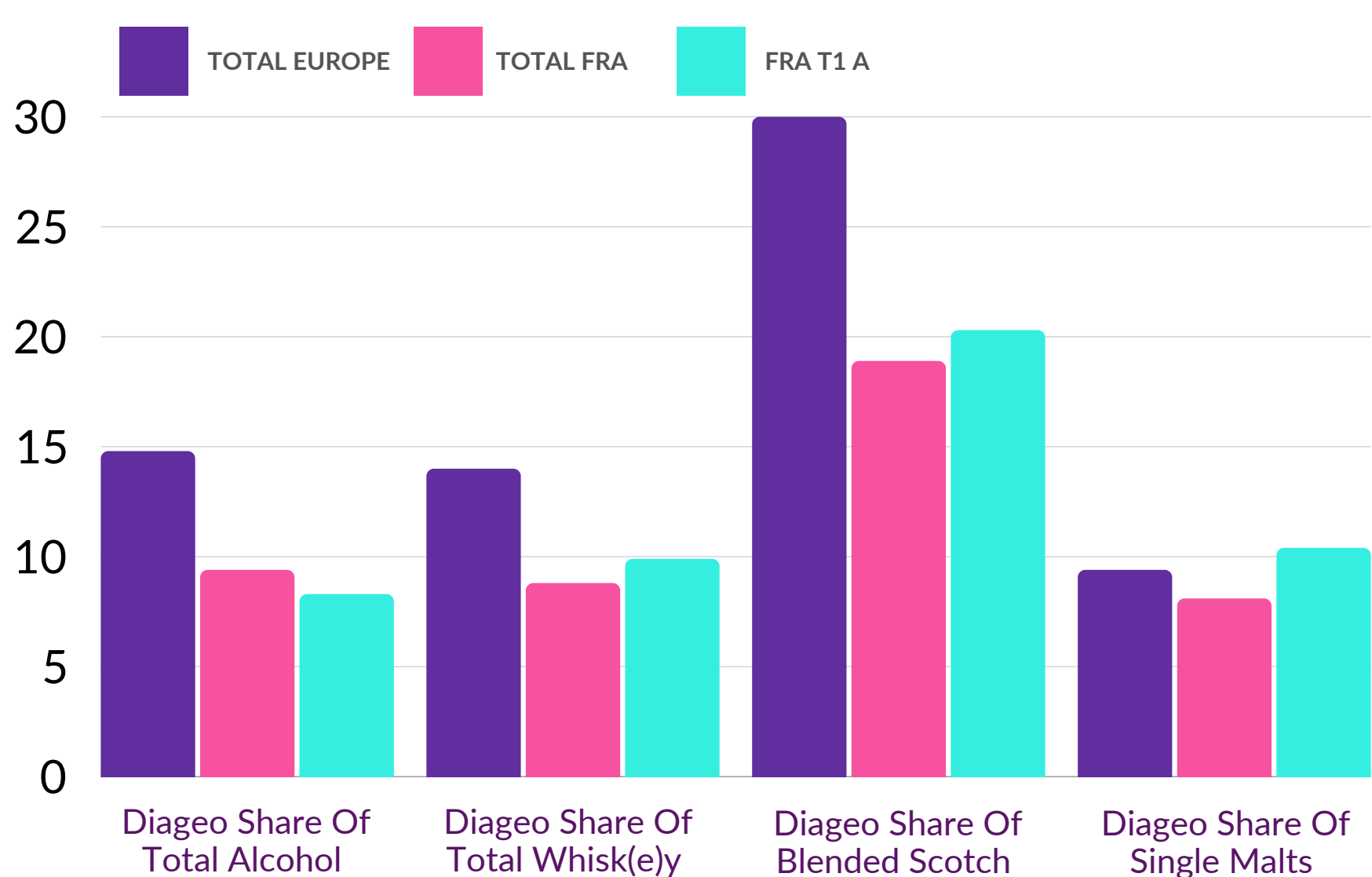
Benchmarking the key metrics of share of space at a total and sub-category level highlights strategic opportunities for Diageo to enhance in-store presence and competitiveness.

Share Of Linear Space (m)



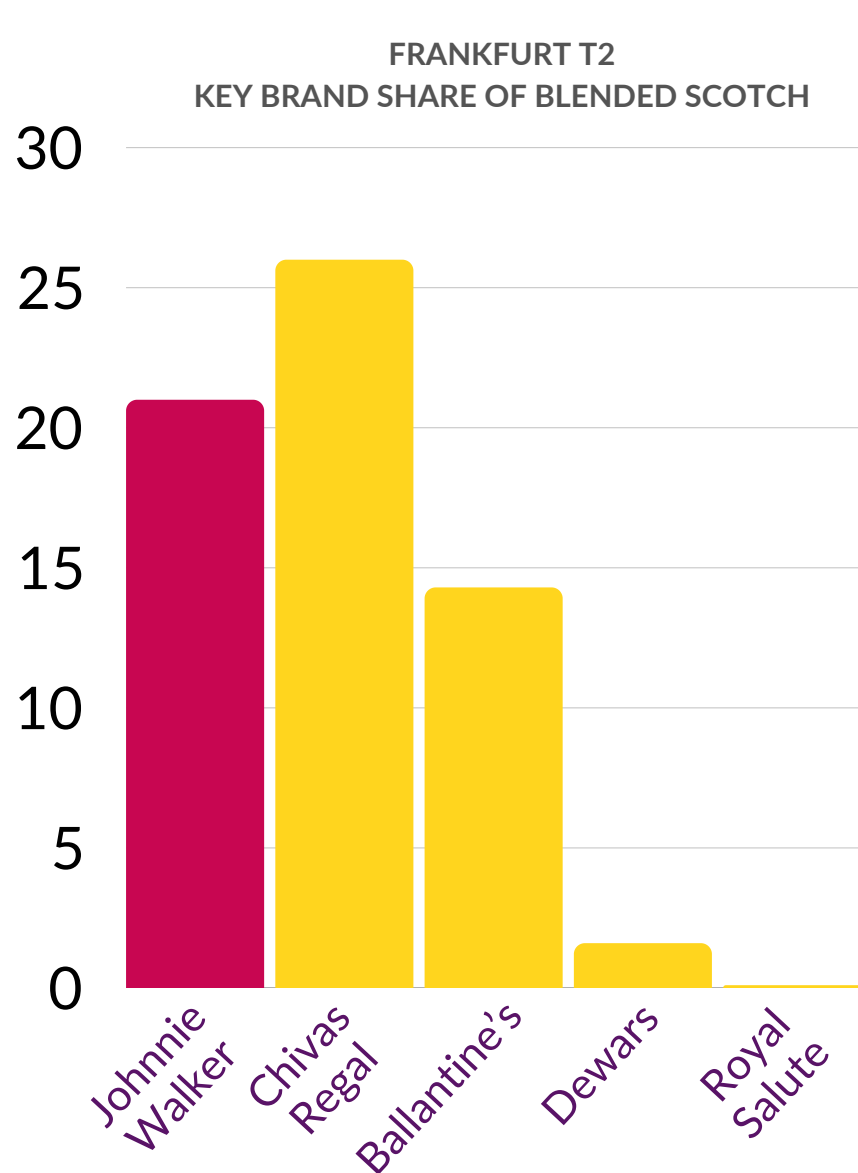
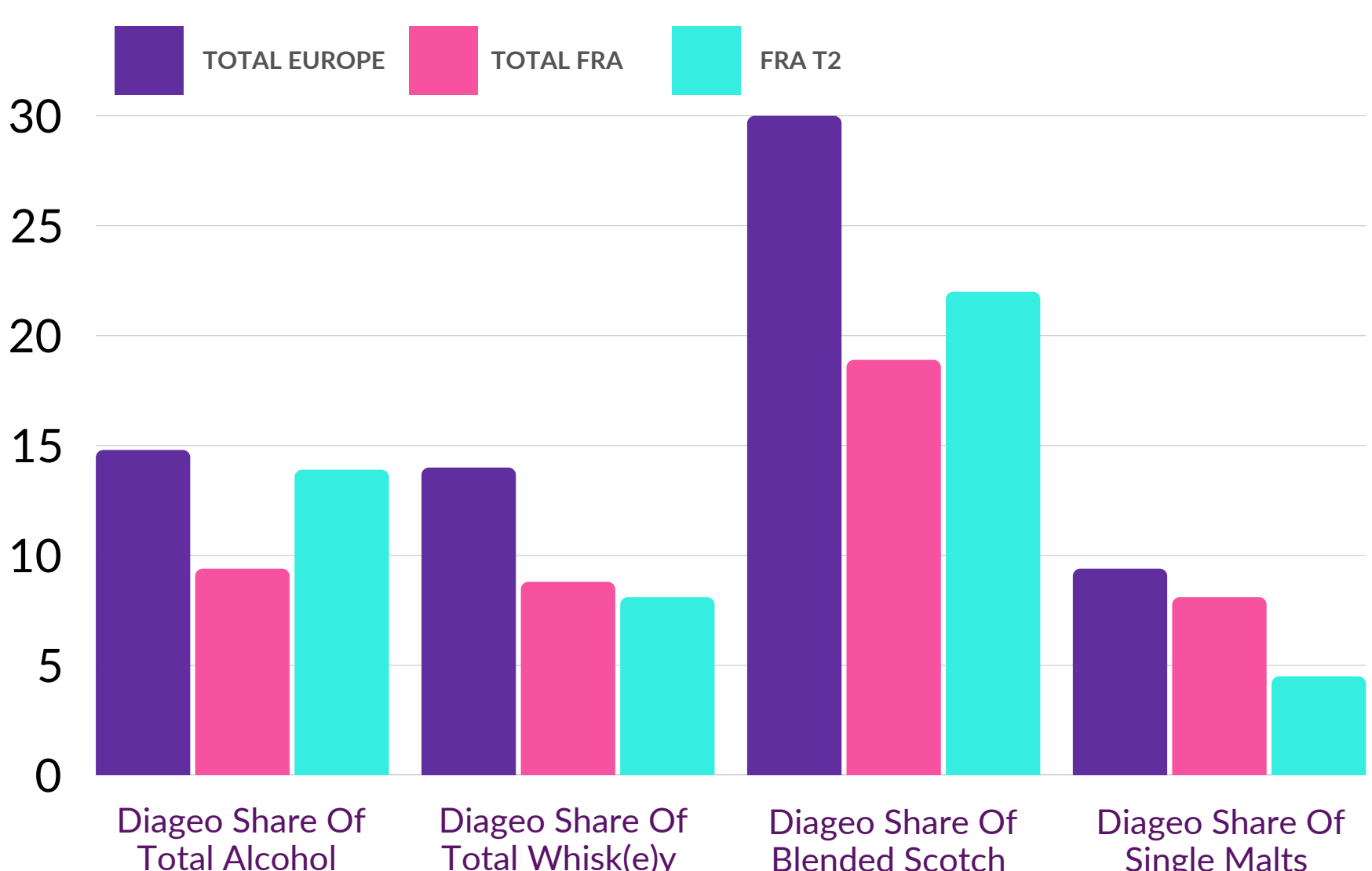
FRANKFURT T1 Z

- Diageo share of total alcohol and of total Whisk(e)y is **significantly lower** than total Europe.
- Diageo share of Blended Scotch is **50% lower** than the European average.
- Johnnie Walker share of Blends is also **50% less** than the Europe average.
- Ballantine's share of Blends is **63% higher** than the Europe average.



FRANKFURT T1 A

- Diageo share of total alcohol and of total Whisk(e)y is **lower** than total Europe but better compared to T1 Z.
- Diageo share of Blended Scotch is above the FRA average but still **32% lower** than the European average.
- Johnnie Walker share of Blends is also **29% less** than the Europe average.
- Ballantine's share of Blends is **162% higher** than the Europe average.



FRANKFURT T2

- Diageo share of total Whisk(e)y is **42% lower** than total Europe.
- Diageo share of Blended Scotch is above the FRA average but still **27% lower** than the European average.
- Johnnie Walker share of Blends is also **27% less** than the Europe average.
- Diageo share of total Single Malts is **52% lower** than the Europe average.

FRA T1 Z Execution

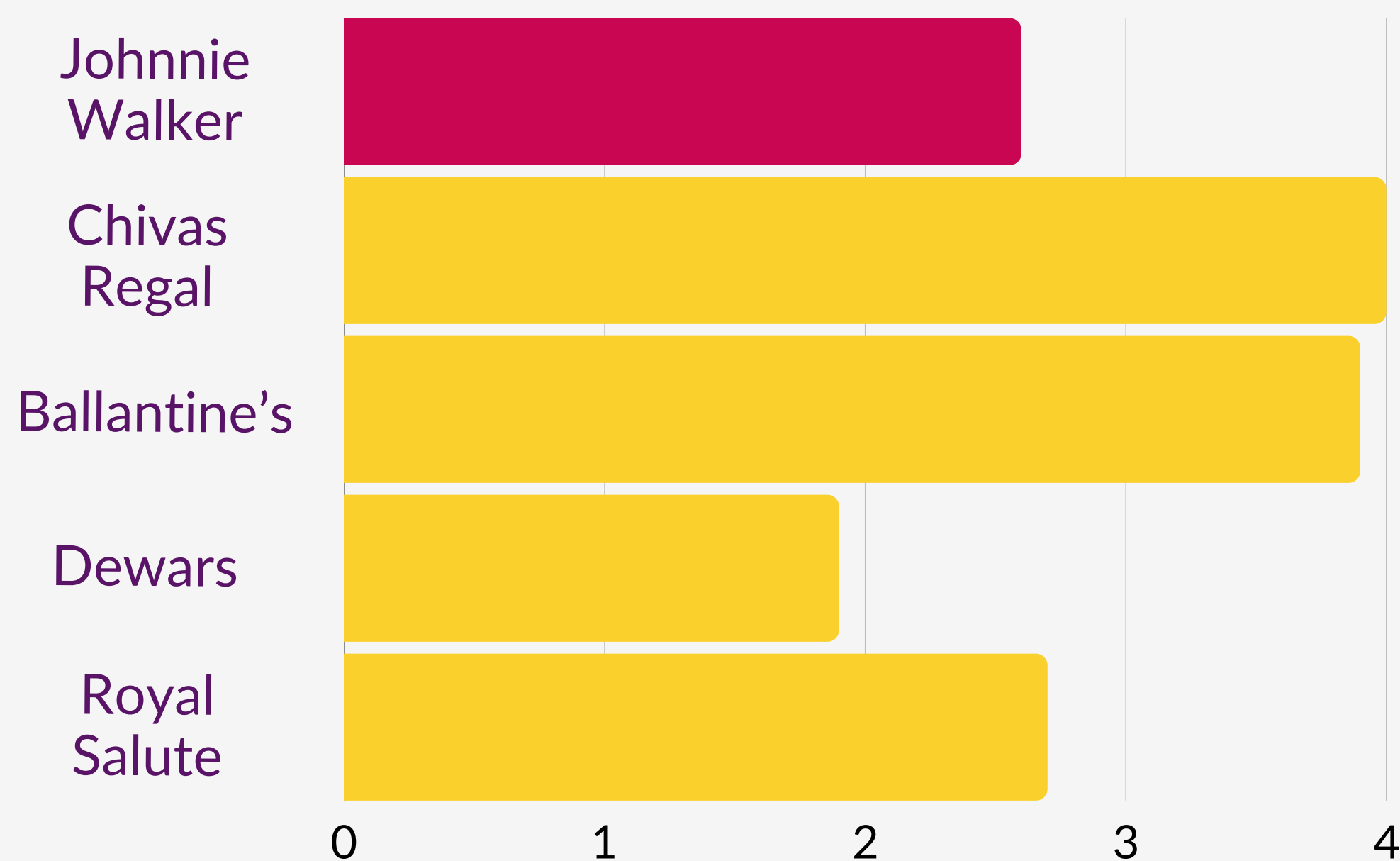
Overall execution of total Whisk(e)y, including Blended Scotch, reveals clear opportunity for improvement. The Johnnie Walker space is unbranded and is displayed below eye level.



FACINGS PER SKU

Johnnie Walker has 2.6 facings per SKU. The 2nd lowest average for number of facings per SKU for key Blend brands.

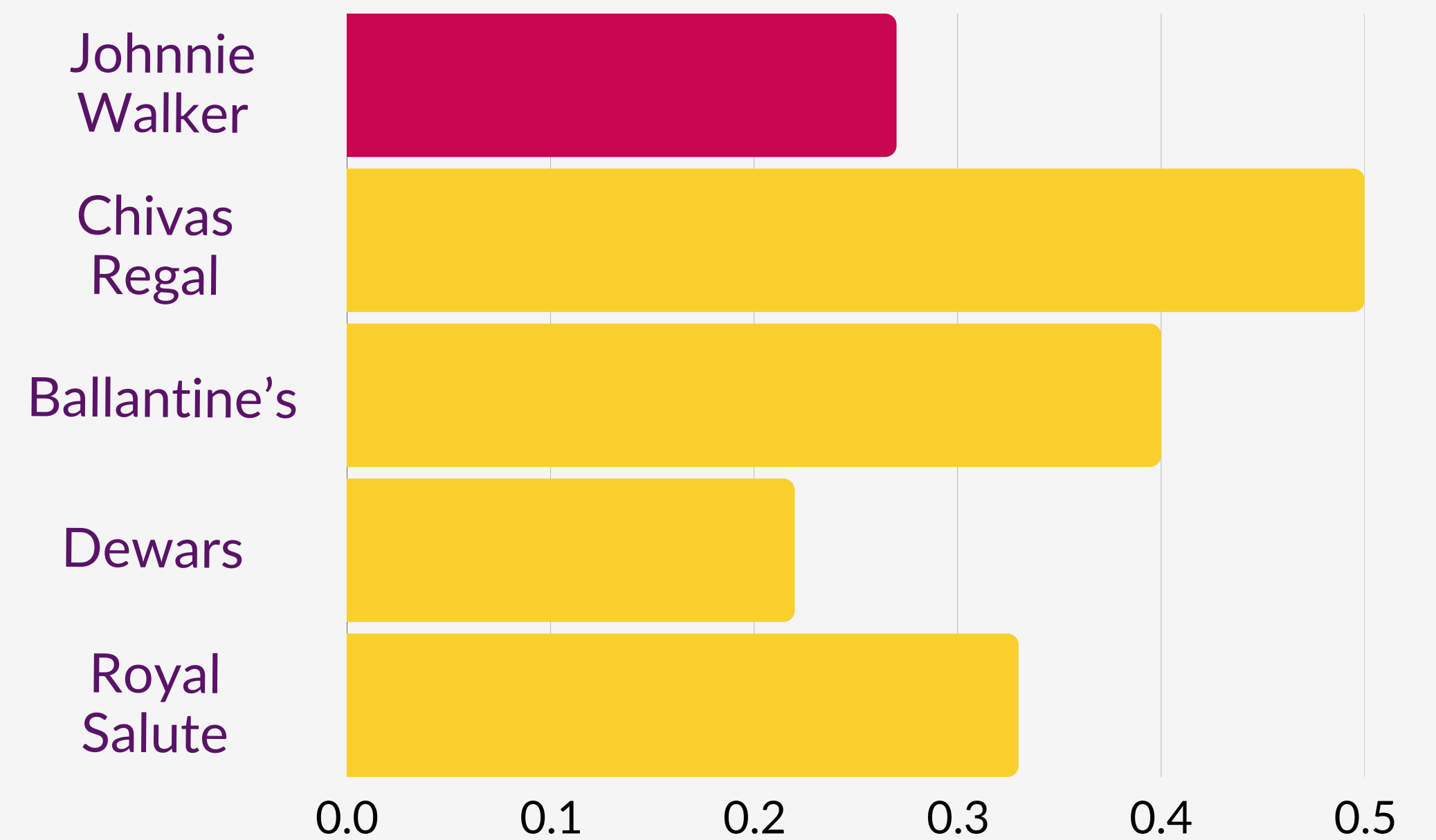
NB: Johnnie Walker in LHR T3 has 12.2 facings per SKU



SKU DENSITY (No. SKUs Per Linear Mtre)

Johnnie Walker has the 2nd lowest share of linear space per SKU at 0.27 Linear Metres Per SKU compared to the key Blend brands.

NB: Johnnie Walker in LHR T3 has 1.4 Linear Metres per SKU



Summary And Opportunities

Overall share of space for Diageo, and specifically for the Johnnie Walker brand compared to the rest of Europe shows a significant under representation. Execution standards compared to other airport locations shows huge opportunity for increased visibility and presence.

1

Diageo can make significant space and assortment gains by aiming to move share of space towards their European average.

2

Diageo must review their competitive position in-store versus the rest of Blends to improve visibility and presence.

3

Diageo to advise on full Whisk(e)y cat-dev plan with Heinemann to unlock clear total category growth opportunity.