

Case Study | Alcohol | Diageo

Diageo leads Whisky across Europe. In Frankfurt, Johnnie Walker sat unbranded below eye level.



A Shelftrak audit benchmarked Diageo's share of the Whisk(e)y category across all three Frankfurt Airport stores against total Europe — and found gaps in every terminal and every sub-category, right down to individual facings.

CLIENT	CATEGORY	SCOPE	DATA
DIAGEO	WHISK(E)Y	FRANKFURT AIRPORT, 3 STORES	SHELFTRAK AUDIT, AUG 2024

THE BRIEF

Break down one airport, store by store, and measure it against Europe.

Diageo wanted to know how its Whisk(e)y portfolio was performing at Frankfurt, one of Europe's busiest hubs, using total Europe as the benchmark.

That meant measuring share of space at every level — total alcohol, total Whisk(e)y, Blended Scotch and Single Malts — and then benchmarking Johnnie Walker's space, facings and positioning against Chivas Regal, Ballantine's, Dewar's and Royal Salute.

Shelftrak audited all three stores: T1 Z, T1 A and T2. None of them reached the European benchmark on any measure.

WHAT THE AUDIT FOUND

37%

below the European average
share of Whisk(e)y space
across Frankfurt Airport

35%

below the European average
share of Blended Scotch for
Johnnie Walker

52%

below the European average
share of Single Malts for
Diageo in Frankfurt T2

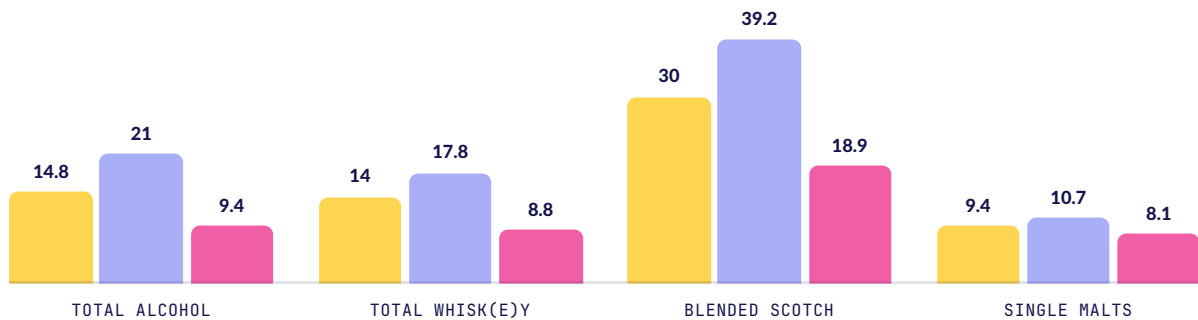
FINDING 01

Frankfurt trails Europe at every level of the category.

Across Europe, Diageo holds 30% of Blended Scotch space and the UK proves it can hold nearly 40%. Frankfurt gives it under 19%. The same pattern repeats for total alcohol, total Whisk(e)y and Single Malts — this is not one weak fixture, it is a whole-airport gap.

Diageo share of linear space (%)

■ Total Europe ■ Total UK ■ Total Frankfurt

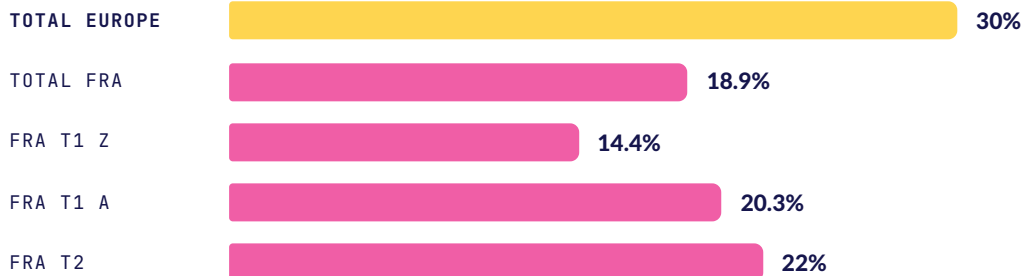


FINDING 02

No Frankfurt store reaches the European benchmark for Blends.

T1 Z is the weakest at half the European average. T1 A and T2 sit above the Frankfurt average but are still 32% and 27% short of Europe. Johnnie Walker's own share of Blends follows the same pattern in each store.

DIAGEO SHARE OF BLENDED SCOTCH LINEAR SPACE BY STORE (%)

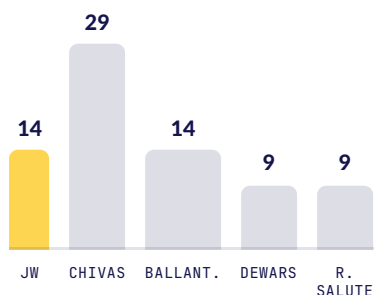


FINDING 03

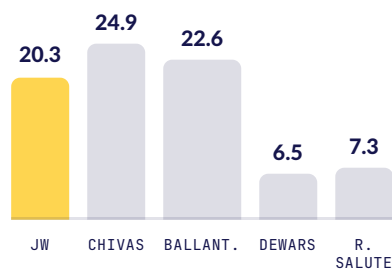
Chivas Regal out-spaces Johnnie Walker in every terminal.

In T1 Z, Chivas holds twice Johnnie Walker's share of Blends. In T1 A, Ballantine's does too — at 162% above its own European average. The category leader is third on the fixture.

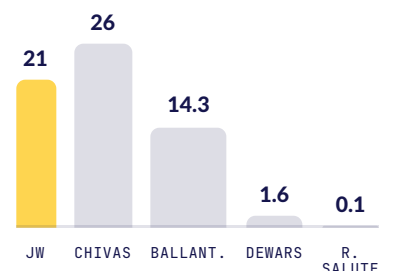
FRA T1 Z — share of Blended Scotch (%)



FRA T1 A — share of Blended Scotch (%)



FRA T2 — share of Blended Scotch (%)



JW = JOHNNIE WALKER · BALLANT. = BALLANTINE'S · R. SALUTE = ROYAL SALUTE · SAFFRON = DIAGEO BRAND

INSIDE THE STORE — FRANKFURT T1 Z

Unbranded. Below eye level. Second-fewest facings on the fixture.

The audit photos tell the story the percentages can't. Ballantine's and Chivas Regal both have branded fixtures at eye level. Johnnie Walker's space is unbranded and sits below them, with 2.6 facings per SKU — the second-lowest of the key Blend brands.

The contrast with a well-executed store is stark: in Heathrow T3, Johnnie Walker runs at 12.2 facings per SKU and 1.4 linear metres per SKU. Frankfurt T1 Z gives it 0.27 metres.



SHELFTRAK AUDIT PHOTOS — FRANKFURT T1 Z

FACINGS PER SKU

JOHNNIE WALKER	2.6
CHIVAS REGAL	4
BALLANTINE'S	3.9
DEWAR'S	1.9
ROYAL SALUTE	2.7

LINEAR METRES PER SKU

JOHNNIE WALKER	0.27m
CHIVAS REGAL	0.5m
BALLANTINE'S	0.4m
DEWAR'S	0.22m
ROYAL SALUTE	0.33m

FOR COMPARISON, JOHNNIE WALKER IN LHR T3: 12.2 FACINGS PER SKU · 1.4 M PER SKU

THE RECOMMENDATIONS

What the audit told Diageo to do next

01 Close the gap to the European average

Diageo holds 30% of Blended Scotch space across Europe and under 19% in Frankfurt. Moving each terminal towards the brand's own average is a measurable space and assortment gain.

02 Rebuild the position against the other Blends

Chivas Regal out-spaces Johnnie Walker in every Frankfurt store, and Ballantine's sits 162% above its own European average in T1 A. The audit gives Diageo the evidence to reset the competitive position in-store.

03 Lead the Whisk(e)y category review

Diageo is under-represented across total alcohol, Whisk(e)y, Blends and Malts alike. The data supports Diageo advising Heinemann on a full Whisk(e)y category development plan for the airport.

ABOUT SHELFTRAK



Shelftrak turns a photo of any shelf, fixture or back bar into verified, SKU-level data on space, range, price and promotion — helping brands and retailers across travel retail, multi-sector retail and on-trade & hospitality see what's really happening in store.

Through market tracking, bespoke audits and expert-led advisory, that data becomes a clear plan for growth.

More information and case studies can be found at shelftrak.com