

Access to supermarket retailers across Scotland

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About Nesta

Nesta is a research and innovation foundation that designs, tests and scales solutions for the biggest challenges of our time.

Driven by a vision to improve the lives of millions of people, our focus up to 2030 is on three missions: breaking the link between family background and life chances, halving obesity and cutting household carbon emissions.

We work with partners to develop high-potential solutions and test them as they evolve, drawing on expertise in qualitative and quantitative research, data science, behavioural science and design.

Once confident in the effectiveness of a solution, we take it to scale. We create national policy proposals, develop consumer-facing products and services, build and spin out commercial ventures and harness the power of the arts.

We work with two specialised units: BIT applies a deep understanding of human behaviour to help clients achieve their goals. Challenge Works designs and runs challenge prizes to spark innovation in science, technology and society.

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1. Background and aims

[Scotland's Population Health Framework](#) has set two priorities for its initial phase: (1) embedding prevention in our systems and (2) improving healthy weight. What people eat is determined by where they live and their personal circumstances, which together influence what food is accessible. Developing a whole system approach to improve the healthfulness of food environments across Scotland is key to the Population Health Framework's success. Healthier food environments are also critical for achieving the outcomes of the [Good Food Nation \(Scotland\) Act](#) and well aligned with the [National Planning Framework 4 \(NPF4\)](#).

Most research on food environments in Scotland has focused on out of home (OOH) food from takeaways, restaurants, etc.¹ but most food consumed (in terms of percentage of calories) is purchased from supermarket retailers.^{2,3} To address the healthfulness of foods on offer at supermarket retailers, [Nesta has proposed a policy](#) to mandate a minimum target for healthy food sales for the UK's largest supermarket retail chains. A gap remains, however, in how such a policy targeting supermarket retailers may impact different geographies and areas of deprivation, particularly in the Scottish context.

The main aim of this project was to determine the percentage of the Scottish population falling into specific travel-time brackets to the nearest top-10 supermarket retailer¹ (within 5 minutes, within 10 minutes, and within 15 minutes) by walking, cycling, driving, and public transport. We further evaluated how much these percentages changed if additional retailers were included, namely Scotmid, Spar, or Lidl. Finally, we evaluated differences in supermarket retailer accessibility by neighbourhood deprivation, urban rural classification, and local authority.

¹ Top 10 supermarket retailers based on UK-wide data include: Tesco, Sainsbury's, Asda, Aldi, Morrisons, Lidl, Co-op, Waitrose, Iceland, and M&S Food. Ocado was not included because it is online only.

2. Research Methodology

We conducted a geographic information science (GIS) analysis using data from two sources. The names and addresses of all supermarket retailers in Scotland were from the Food Standards Agency's (FSA) database, downloaded on 4 February 2026. A list of all residential addresses in Scotland was obtained from the Royal Mail's Postcode Address File (PAF) in February 2026 (Version Y26M02).

The FSA database allows businesses to self-select their business type from a list of categories that includes "Retailers - supermarkets/hypermarkets" and "Retailers - other". Top 10 retailers (Tesco, Sainsbury's, Asda, Aldi, Morrisons, Lidl, Co-op, Waitrose, Iceland, and M&S Food), Spar, Scotmid, and Londis were identified in these two categories. All other businesses that self-selected "Retailers - supermarkets/hypermarkets" but were not a top 10 retailer, Spar, Scotmid, or Londis, were classified as "Other".

Urban rural classification and Scottish Index of Multiple Deprivation (SIMD) data were from Scottish Government GIS Data and downloaded on 14 April 2026. The urban rural classification assigns addresses into one of six classes (**Table 1**).

Table 1. Description of urban rural classification system used to classify addresses.

Class name	Description
Large Urban Areas	Settlements of 125,000 people and over.
Other Urban Areas	Settlements of 10,000 to 124,999 people.
Accessible Small Towns	Settlements of 3,000 to 9,999 people, and within a 30 minute drive time of a Settlement of 10,000 or more.
Remote Small Towns	Settlements of 3,000 to 9,999 people, and with a drive time of over 30 minutes to a Settlement of 10,000 or more.
Accessible Rural Areas	Areas with a population of less than 3,000 people, and within a 30 minute drive time of a Settlement of 10,000 or more.
Remote Rural Areas	Areas with a population of less than 3,000 people, and with a drive time of over 30 minutes to a Settlement of 10,000 or more.

Non-residential addresses were removed from the PAF file in line with the [Scottish Government's RAP \(Reproducible Analytical Pipeline\)](#). Briefly, addresses that had an organisational name and no multi occupancy indicator, and addresses with 'Y' in the Small User Organisation indicator (which indicates the presence of a small business) were removed. We then flagged records containing 'Business' or 'Industrial' in the Print Address field and manually screened and excluded non-residential addresses.

Geocoordinates were added to the PAF data using the Scottish Postcode Directory from the National Records of Scotland (download date: 15 April 2026) and the ONS Postcode Directory from the Office for National Statistics (download date: 27 March 2026). Any remaining coordinates were added

using Postcodes.io, an open-source API for UK postcodes. A total of 120 addresses (0.004%) could not be matched to geocoordinates and were therefore removed from the dataset.

For each residential address in Scotland, we determined whether it was within 5, 10, or 15 minutes walking, cycling, driving, or taking public transport to (1) a top-10 supermarket retailer and (2) a top-10 supermarket retailer, Scotmid, Spar, or Londis. Data were visualised using isochrone maps.

Data matching and processing was conducted using R version 4.2.2. The GIS analysis was conducted using QGIS version 3.40.9 LTR and the TravelTime Plugin. Code files are available on [GitHub](#).

3. Limitations

While the PAF database provides the most up-to-date information on addresses in Scotland, it includes non-residential addresses as well as second homes, for example. We used the same approach used in other national surveys that use the PAF file to exclude non-residential addresses. However, we cannot rule out the fact that non-residential addresses may be included in our final dataset. The total number of addresses in our analysis was 2,795,411 whereas the Scottish Census in 2022 indicated there were 2,509,300 households in Scotland with at least one usual resident. The over-estimation of addresses in our dataset is likely due to residual non-residential addresses, second homes, an increase in the number of households in Scotland since 2022, or some combination of these and other factors.

In addition, data on travel times for remote areas, particularly islands, may be more prone to error due to variability in ferry routes and travel times on single-track roads. Public transport time tables vary day-to-day, and so accessibility reported here may not be reflective of accessibility on every day of the week (for example, weekdays versus weekend days).

We were not able to account for car or cycle ownership at each address as such data are not available in the PAF database. Therefore, accessibility via driving or cycling should be considered an upper bound as some of the addresses will not have access to a car or cycle. According to [Transport Scotland's 2025 Transport statistics](#), 73% of households in Scotland have access to one or more cars. Vehicle ownership per capita is higher in more rural areas. The three areas with the highest vehicle ownership in Scotland are Stirling (830 vehicles per 1,000 people aged 17+), Orkney (814 vehicles per 1,000 people aged 17+), and Renfrewshire (794 vehicles per 1,000 people aged 17+). The average vehicle ownership across Scotland is 572 vehicles per 1,000 people aged 17+.

Online grocery delivery is not accounted for and may increase accessibility to top-10 supermarket retailers in some areas. A 2021 study found that Tesco delivery radius included 99.7% of households in Great Britain, while the 0.3% of UK households (9,947 households) that had no online groceries delivery by Tesco were all located on outlying Scottish Islands.⁴

Accessibility data are based on addresses of supermarket retailers. Data on the availability of healthy foods such as fresh fruits and vegetables within retailers are not publicly available. In some parts of Scotland, such as islands, stockouts in major supermarket retailers may mean that whilst addresses can access such retailers, they cannot access healthy food.^{5,6}

4. Results

4.1. Overview of supermarket retailers in Scotland

There were 2,025 supermarket retailers registered in Scotland in the FSA database,² 1,325 (65%) of which were top-10 supermarket retailers. Spar, Scotmid and Londis added a further 200 (10%), 129 (6%) and 96 (5%) supermarket retailers respectively.

A slightly higher proportion of supermarket retailers in the least deprived neighbourhoods were top-10 retailers and a slightly lower proportion were Spar as compared to more deprived neighbourhoods (**Table 2**). Remote small towns were most reliant on top-10 retailers (which made up 84% of retailers in these areas) whereas accessible rural areas were least reliant (only 57% of retailers in these areas were top-10). 'Other' retailers included convenience stores, Farm Foods, and international grocery stores; a full list is available in the **Appendix Table 1**.

Table 2. Location of supermarket retailers in Scotland, by neighbourhood deprivation and urban rural classification (n=2,025 supermarket retailers).

	Top 10 (n=1,325)	Spar (n=200)	Scotmid (n=129)	Londis (n=96)	Other (n=275)
Scottish Index of Multiple Deprivation (SIMD) Quintile¹					
1st (Most Deprived)	63% (256)	10% (42)	6.9% (28)	4.4% (18)	16% (64)
2nd	64% (321)	12% (59)	6.0% (30)	5.0% (25)	13% (66)
3rd	65% (261)	9.0% (36)	7.0% (28)	5.5% (22)	14% (55)
4th	68% (262)	9.9% (38)	5.5% (21)	4.4% (17)	12% (47)
5th (Least Deprived)	68% (212)	7.1% (22)	6.8% (21)	4.5% (14)	13% (41)
Urban rural classification²					
Large Urban Areas	65% (531)	6.9% (56)	7.0% (57)	6.9% (56)	14% (112)
Other Urban Areas	66% (437)	9.7% (64)	6.2% (41)	3.6% (24)	15% (97)
Accessible Small Towns	68% (146)	12% (25)	7.5% (16)	1.9% (4)	11% (23)
Remote Small Towns	84% (36)	2.3% (1)	2.3% (1)	2.3% (1)	9.3% (4)
Accessible Rural Areas	57% (112)	21% (41)	6.1% (12)	5.1% (10)	11% (21)
Remote Rural Areas	63% (50)	14% (11)	1.3% (1)	1.3% (1)	21% (17)

Values are percentage (n).

¹ SIMD data were not available for 19 supermarket retailers.

² Urban rural classification data were not available for 17 supermarket retailers.

² A total of 1,363 self-selected their classification as 'Retailers – supermarket / hypermarket.' A further 749 self-selected their classification as 'Retailers – other' and were identified as a top 10 supermarket retailer, Spar, Scotmid, or Londis (out of a total of 10,456 that self-selected 'Retailers – other').

There were several notable differences in the distribution of supermarket retailers by local authority (**Table 3**). Several local authorities relied almost exclusively on top-10 retailers, namely Argyll and Bute, Comhairle nan Eilean Siar (Western Isles), and Shetland Islands. On the other hand, Dumfries and Galloway and South Ayrshire each relied more on Spar with more than 20% of supermarket retailers in these two local authorities being Spar. Scotmid accounted for a notable proportion in East Dunbartonshire (18% of supermarket retailers), the City of Edinburgh and Midlothian (17% of retailers each).

Table 3. Location of supermarket retailers in Scotland, by local authority (n=2,025 supermarket retailers).

Local Authority	Top 10 (n=1,325)	Spar (n=200)	Scotmid (n=129)	Londis (n=96)	Other (n=275)
Aberdeen City	65% (74)	12% (13)	1.8% (2)	9.7% (11)	12% (13)
Aberdeenshire	59% (73)	4.0% (5)	4.8% (6)	3.2% (4)	29% (36)
Angus	63% (25)	13% (5)	5.0% (2)	0% (0)	20% (8)
Argyll and Bute	82% (9)	0% (0)	0% (0)	0% (0)	18% (2)
Clackmannanshire	71% (15)	4.8% (1)	9.5% (2)	0% (0)	14% (3)
Comhairle nan Eilean Siar (Western Isles)	88% (7)	0% (0)	0% (0)	0% (0)	13% (1)
Dumfries and Galloway	52% (34)	20% (13)	0% (0)	4.6% (3)	23% (15)
Dundee City	73% (38)	9.6% (5)	3.8% (2)	0% (0)	13% (7)
East Ayrshire	61% (23)	11% (4)	11% (4)	0% (0)	18% (7)
East Dunbartonshire	55% (21)	11% (4)	18% (7)	0% (0)	16% (6)
East Lothian	68% (27)	2.5% (1)	7.5% (3)	10% (4)	13% (5)
East Renfrewshire	71% (20)	7.1% (2)	11% (3)	7.1% (2)	3.6% (1)
Edinburgh (City of)	61% (113)	1.1% (2)	17% (32)	4.8% (9)	16% (30)
Falkirk	55% (31)	16% (9)	13% (7)	11% (6)	5.4% (3)
Fife	73% (99)	12% (16)	2.2% (3)	2.2% (3)	11% (15)
Glasgow City	70% (146)	6.7% (14)	1.4% (3)	9.0% (19)	13% (28)
Highland	61% (83)	15% (20)	8.8% (12)	0.7% (1)	15% (21)
Inverclyde	68% (21)	13% (4)	3.2% (1)	3.2% (1)	13% (4)
Midlothian	67% (20)	10% (3)	17% (5)	3.3% (1)	3.3% (1)
Moray	60% (28)	13% (6)	8.5% (4)	4.3% (2)	15% (7)
North Ayrshire	80% (36)	13% (6)	0% (0)	4.4% (2)	2.2% (1)
North Lanarkshire	52% (54)	15% (16)	9.6% (10)	5.8% (6)	17% (18)
Orkney Islands	86% (6)	0% (0)	0% (0)	14% (1)	0% (0)
Perth and Kinross	65% (34)	13% (7)	3.8% (2)	0% (0)	17% (9)
Renfrewshire	66% (37)	11% (6)	0% (0)	7.1% (4)	16% (9)
Scottish Borders	79% (33)	14% (6)	0% (0)	0% (0)	7.1% (3)
Shetland Islands	100% (5)	0% (0)	0% (0)	0% (0)	0% (0)
South Ayrshire	64% (30)	26% (12)	2.1% (1)	0% (0)	8.5% (4)
South Lanarkshire	66% (87)	11% (14)	9.1% (12)	6.8% (9)	7.6% (10)
Stirling	73% (30)	7.3% (3)	2.4% (1)	4.9% (2)	12% (5)
West Dunbartonshire	71% (25)	5.7% (2)	14% (5)	2.9% (1)	5.7% (2)
West Lothian	85% (41)	2.1% (1)	0% (0)	10% (5)	2.1% (1)

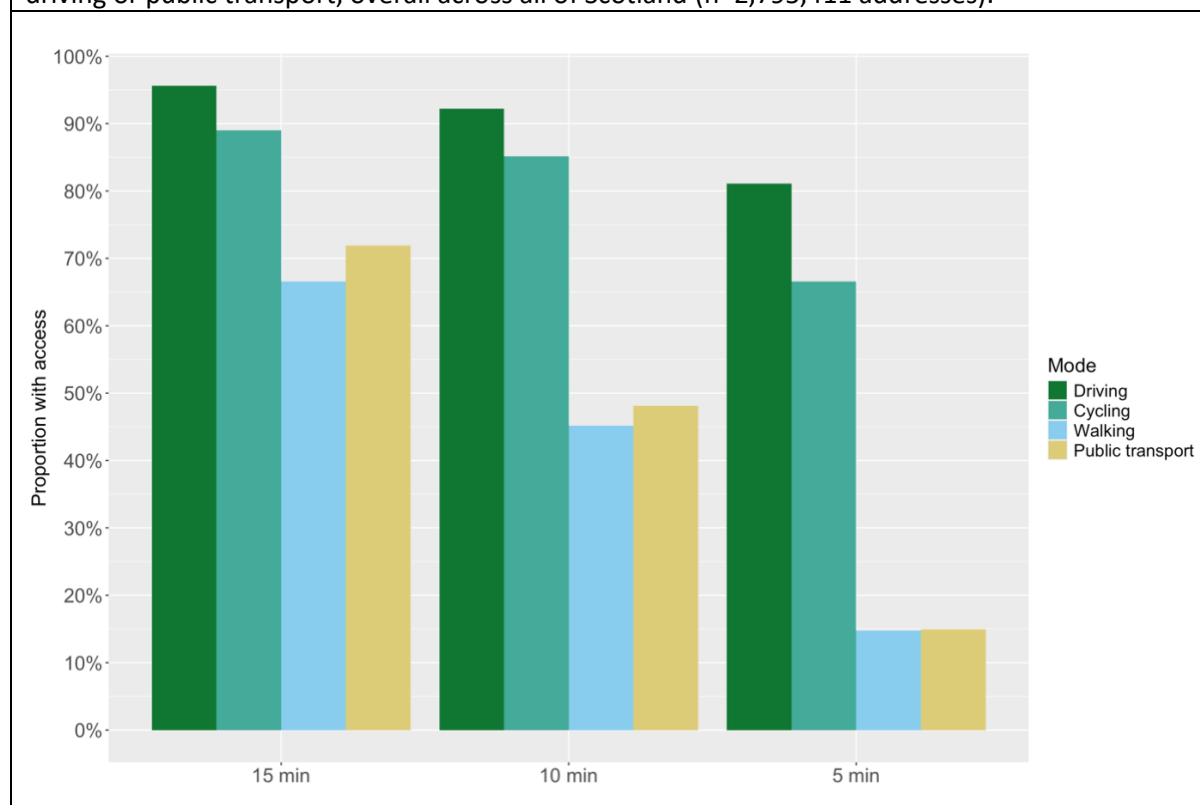
Values are percentage (n).

4.2. Access to top-10 supermarket retailers across Scotland

4.2.1. Overall

Overall, across all of Scotland, 96% of addresses³ are within 15 minutes driving to a top-10 supermarket retailer, 93% are within 10 minutes, and 81% are within 5 minutes. These proportions decrease substantially moving from driving or cycling to walking and public transport (**Figure 1**). Nonetheless, more than half of addresses were within 15 minutes walking (67%) or via public transport (72%) to a top-10 supermarket.

Figure 1. Access to a top-10 supermarket retailer within 15, 10 or 5 minutes by walking, cycling, driving or public transport, overall across all of Scotland (n=2,795,411 addresses).



³ 0.18% of addresses had multiple residency, the highest being 473 at a student hall in Aberdeen. Weighting by multiple residency did not substantively influence results and so results presented are unweighted.

4.2.2. By neighbourhood deprivation

There was not a clear trend in access to a top-10 supermarket retailer across SIMD quintiles (**Table 4**). The most and least deprived quintiles had the highest access via driving and cycling, whereas the 3rd and 4th SIMD quintiles had the lowest access across all means of transport. The most deprived quintile had the greatest access via walking or public transport: 78% of addresses in the most deprived quintile were within 15 minutes walking to a top-10 supermarket retailer compared to 55% in the 4th quintile (less deprived), for example.

Table 4. Access to top-10 supermarket retailers according to Scottish Index of Multiple Deprivation (SIMD) Quintile¹ (2,774,118 addresses).

Indicator	SIMD Quintile				
	1st (Most Deprived)	2nd	3rd	4th	5th (Least Deprived)
15 minutes					
Driving	99%	97%	89%	96%	100%
Cycling	98%	94%	77%	83%	97%
Walking	78%	75%	58%	55%	71%
Public transport	85%	81%	61%	60%	77%
10 minutes					
Driving	98%	96%	83%	89%	98%
Cycling	96%	91%	73%	76%	94%
Walking	54%	54%	41%	36%	44%
Public transport	58%	57%	43%	38%	47%
5 minutes					
Driving	92%	87%	70%	71%	90%
Cycling	77%	75%	58%	55%	70%
Walking	16%	18%	15%	12%	14%
Public transport	16%	18%	15%	12%	14%

¹ SIMD data were not available for 21,293 addresses.

SIMD quintile results were largely consistent across local authorities (**Annexe Excel Tables 1**) with some noteworthy exceptions. In Argyll and Bute, in contrast to national data, addresses in the most deprived areas had much lower access to a top-10 supermarket retailer: 31% within 15 minutes driving in the most deprived SIMD quintile versus 79% in the least deprived (**Table 5**). The same was true in East Ayrshire and Orkney Islands.

In Dumfries and Galloway, addresses in the most deprived areas had lower access via driving and cycling, but greater access via walking and public transport compared to addresses in the least deprived areas (**Table 5**). Likewise, in Fife, Moray, North and South Ayrshire, North and South Lanarkshire, Perth and Kinross, Renfrewshire, Scottish Borders, Stirling, West Dunbartonshire, and West Lothian, access via walking and public transport was higher for addresses in the most deprived areas as compared to the least deprived. In Glasgow City, addresses in the most deprived areas had lower access via walking and public transport to a top-10 supermarket retailer as compared to addresses in the least deprived areas.

Table 5. Access to top-10 supermarket retailers within 15 minutes according to Scottish Index of Multiple Deprivation (SIMD) Quintile and local authority¹ (2,774,118 addresses).

Indicator	SIMD Quintile				
	1st (Most Deprived)	2nd	3rd	4th	5th (Least Deprived)
Argyll and Bute					
Driving	31%	41%	20%	70%	79%
Cycling	31%	38%	16%	53%	78%
Walking	18%	30%	7.3%	30%	37%
Public transport	18%	31%	7.3%	30%	37%
East Ayrshire					
Driving	94%	95%	95%	96%	100%
Cycling	84%	87%	78%	73%	100%
Walking	41%	54%	41%	42%	66%
Public transport	53%	55%	44%	47%	71%
Orkney Islands					
Driving	N/A	44%	56%	87%	100%
Cycling	N/A	44%	41%	58%	100%
Walking	N/A	39%	40%	34%	38%
Public transport	N/A	37%	39%	38%	38%
Dumfries and Galloway					
Driving	84%	85%	82%	92%	100%
Cycling	84%	76%	54%	62%	100%
Walking	82%	67%	36%	36%	59%
Public transport	83%	67%	36%	36%	69%
Fife					
Driving	100%	98%	98%	98%	100%
Cycling	98%	94%	84%	81%	91%
Walking	86%	84%	63%	51%	60%
Public transport	86%	84%	65%	56%	65%
Glasgow City					
Driving	100%	100%	100%	100%	100%
Cycling	100%	100%	100%	100%	100%
Walking	78%	83%	84%	92%	91%
Public transport	88%	88%	91%	96%	93%

¹ SIMD data were not available for 21,293 addresses.

4.2.3. By urban rural classification

There was a strong gradient in access to a top-10 supermarket retailer according to urban rural classification (**Table 6**). Whilst 100% of addresses in urban areas were within 10 minutes driving to a top-10 retailer, only 36% of households in remote rural areas were. Indeed, only 51% of addresses in remote rural areas were within 15 minutes driving to a top-10 supermarket retailer.

Table 6. Access to top-10 supermarket retailers according to urban rural classification¹ (2,774,065 addresses).

Indicator	Urban rural classification					
	Large Urban Areas	Other Urban Areas	Accessible Small Towns	Remote Small Towns	Accessible Rural Areas	Remote Rural Areas
15 minutes						
Driving	100%	100%	99%	82%	94%	51%
Cycling	100%	100%	97%	81%	57%	27%
Walking	81%	73%	76%	62%	24%	18%
Public transport	89%	78%	79%	64%	27%	19%
10 minutes						
Driving	100%	100%	99%	82%	75%	36%
Cycling	99%	97%	92%	79%	42%	23%
Walking	57%	48%	51%	40%	16%	13%
Public transport	62%	50%	52%	42%	16%	14%
5 minutes						
Driving	95%	92%	91%	79%	37%	23%
Cycling	81%	74%	75%	61%	24%	18%
Walking	20%	14%	17%	14%	5.3%	5.5%
Public transport	20%	14%	17%	14%	5.3%	5.5%

¹ Urban rural classification data were not available for 21,346 addresses.

4.2.4. By local authority

For comparisons in accessibility of top-10 supermarket retailers by local authority, we classified local authorities according to the [Improvement Service's Family Groupings](#) for Environmental, Culture & Leisure, Economic Development, Corporate, Property and Tackling Climate Change indicators.

Access to a top-10 supermarket retailer within 15 minutes driving in Local Authority from Family Group 1 ranged from 41% in Argyll and Bute to 94-95% in Aberdeenshire and the Scottish Borders (**Table 7**). Orkney Islands had greater access to a top-10 supermarket retailer than either Comhairle nan Eilean Siar (Western Isles) or Shetland Islands: 74% of addresses within 15 minutes driving in Orkney Islands compared to 53-54% in Comhairle nan Eilean Siar (Western Isles) and Shetland Islands. Access via public transport within 15 minutes was feasible for less than the Scotland-wide proportion (72%) for all Family Group 1 local authorities, with the percentage of addresses dropping to 20-21% in Argyll and Bute and Comhairle nan Eilean Siar (Western Isles).

More than 90% of addresses across all local authorities in Family Groups 2 (**Table 8**), 3 (**Table 9**) and 4 (**Table 10**) were within 15 minutes driving to a top-10 supermarket retailer. In Family Group 4 (**Table 10**) in particular, 100% of addresses were within 15 minutes driving across all local authorities except Falkirk which was 99%. Aberdeen City and Dundee City had the greatest access to a top-10 supermarket retailer across all local authorities. In both areas, 100% of addresses were within 15 minutes driving or cycling to a top-10 supermarket retailer, 92% via public transport, and 87% (Dundee) and 90% (Aberdeen) via walking. Access via public transport was similarly high in Edinburgh (City of) and Glasgow City, but access via walking was slightly lower in these areas (83-84%).

Table 7. Access to top-10 supermarket retailers according to local authority family group 1.

Indicator	Local Authority from Family Group 1							
	Aberdeenshire	Argyll and Bute	Comhairle nan Eilean Siar (Western Isles)	Dumfries and Galloway	Highland	Orkney Islands	Scottish Borders	Shetland Islands
15 minutes								
Driving	95%	41%	53%	86%	83%	74%	94%	54%
Cycling	71%	35%	34%	67%	69%	53%	75%	38%
Walking	53%	20%	21%	49%	46%	36%	56%	30%
Public transport	57%	20%	21%	50%	50%	38%	58%	32%
10 minutes								
Driving	82%	39%	41%	75%	76%	59%	84%	42%
Cycling	66%	29%	28%	63%	64%	50%	69%	36%
Walking	38%	12%	14%	33%	32%	21%	41%	21%
Public transport	39%	12%	13%	34%	33%	21%	42%	21%
5 minutes								
Driving	65%	30%	29%	62%	62%	48%	68%	36%
Cycling	52%	18%	21%	51%	46%	34%	51%	27%
Walking	12%	5.4%	5.5%	11%	10%	5.4%	16%	6.7%
Public transport	12%	5.4%	5.5%	11%	10%	5.4%	16%	6.7%

Table 8. Access to top-10 supermarket retailers according to local authority family group 2.

Indicator	Local Authority from Family Group 2							Stirling
	East Ayrshire	East Lothian	Fife	Moray	North Ayrshire	Perth and Kinross	South Ayrshire	
15 minutes								
Driving	95%	99%	99%	96%	96%	93%	98%	97%
Cycling	83%	95%	90%	79%	93%	71%	86%	84%
Walking	46%	72%	69%	56%	66%	54%	63%	67%
Public transport	52%	76%	71%	57%	70%	55%	67%	67%
10 minutes								
Driving	90%	97%	95%	85%	95%	79%	91%	90%
Cycling	76%	89%	85%	74%	90%	67%	82%	78%
Walking	28%	46%	50%	42%	43%	39%	41%	46%
Public transport	30%	51%	52%	43%	46%	39%	42%	47%
5 minutes								
Driving	69%	85%	81%	73%	81%	65%	79%	77%
Cycling	47%	73%	69%	57%	69%	54%	66%	64%
Walking	8.1%	13%	15%	16%	11%	15%	12%	16%
Public transport	8.2%	13%	15%	16%	11%	15%	12%	16%

Table 9. Access to top-10 supermarket retailers according to local authority family group 3.

Indicator	Local Authority from Family Group 3							
	Angus	Clackmannanshire	East Renfrewshire	Inverclyde	Midlothian	Renfrewshire	South Lanarkshire	West Lothian
15 minutes								
Driving	97%	100%	100%	100%	100%	100%	99%	100%
Cycling	84%	98%	99%	98%	96%	97%	96%	96%
Walking	63%	82%	75%	71%	62%	64%	71%	67%
Public transport	64%	85%	82%	80%	73%	73%	77%	72%
10 minutes								
Driving	87%	100%	100%	100%	99%	100%	98%	99%
Cycling	80%	97%	98%	87%	88%	94%	91%	93%
Walking	40%	58%	46%	43%	39%	36%	43%	44%
Public transport	42%	60%	48%	47%	43%	42%	45%	46%
5 minutes								
Driving	77%	93%	95%	93%	83%	85%	86%	85%
Cycling	63%	80%	77%	50%	63%	64%	74%	70%
Walking	12%	14%	12%	13%	8.6%	8.8%	11%	12%
Public transport	12%	14%	12%	13%	8.7%	8.9%	11%	12%

Table 10. Access to top-10 supermarket retailers according to local authority family group 4.

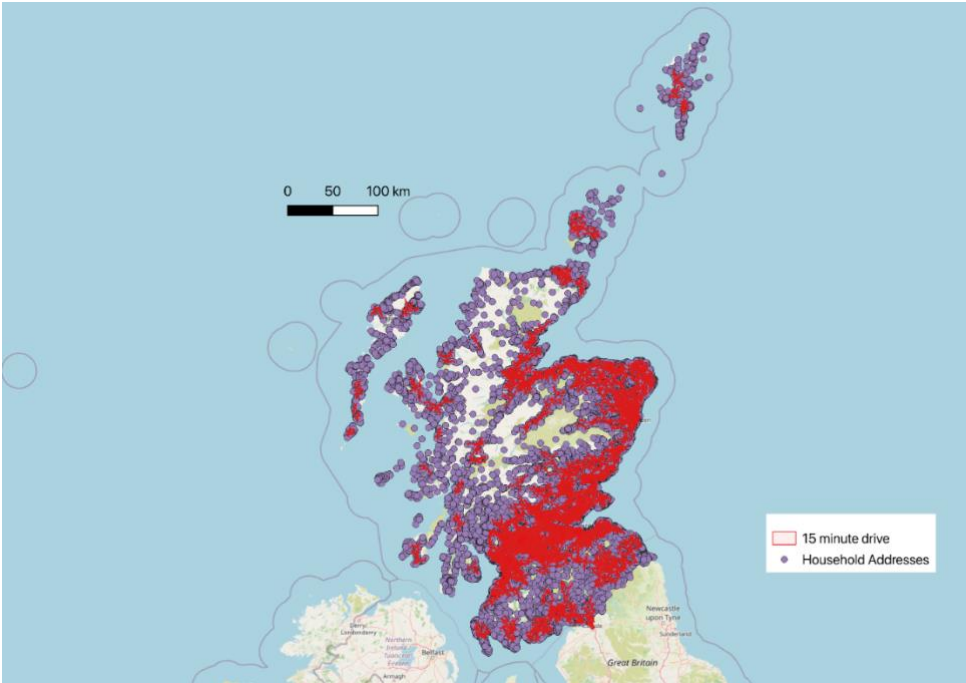
Indicator	Local Authority from Family Group 4							
	Aberdeen City	Dundee City	East Dunbartonshire	Edinburgh, City of	Falkirk	Glasgow City	North Lanarkshire	West Dunbartonshire
15 minutes								
Driving	100%	100%	100%	100%	99%	100%	100%	100%
Cycling	100%	100%	100%	99%	96%	100%	98%	98%
Walking	90%	87%	62%	84%	62%	83%	54%	74%
Public transport	92%	92%	71%	93%	65%	90%	64%	86%
10 minutes								
Driving	100%	100%	100%	100%	98%	100%	99%	100%
Cycling	99%	100%	95%	98%	89%	99%	92%	93%
Walking	68%	62%	33%	62%	37%	59%	31%	46%
Public transport	71%	66%	34%	69%	39%	64%	34%	55%
5 minutes								
Driving	98%	97%	81%	97%	86%	94%	77%	92%
Cycling	89%	85%	63%	85%	62%	82%	56%	73%
Walking	23%	20%	7.6%	27%	10%	21%	7.2%	15%
Public transport	23%	21%	7.6%	27%	10%	22%	7.2%	16%

4.3. Areas with limited access to a top-10 supermarket retailer

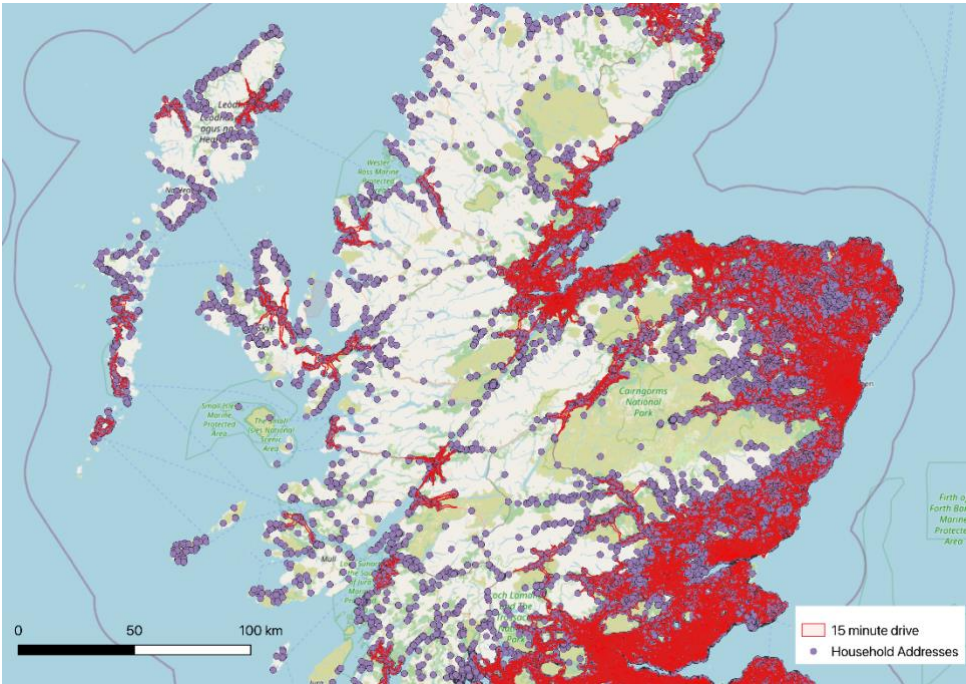
Most addresses that were beyond 15 minutes driving to a top-10 supermarket retailer were in remote rural areas spread all across Scotland (**Figure 2**). Urban areas, specifically Edinburgh, Glasgow, Aberdeen, and Dundee, had 100% access to a top-10 supermarket within a 15-minute drive time (**Table 10**).

Figure 2. Addresses lacking access to a top-10 supermarket retailer within 15 minutes driving across Scotland, indicated by purple dots outside the 15-minute perimeter indicated in red.

(a) Scotland



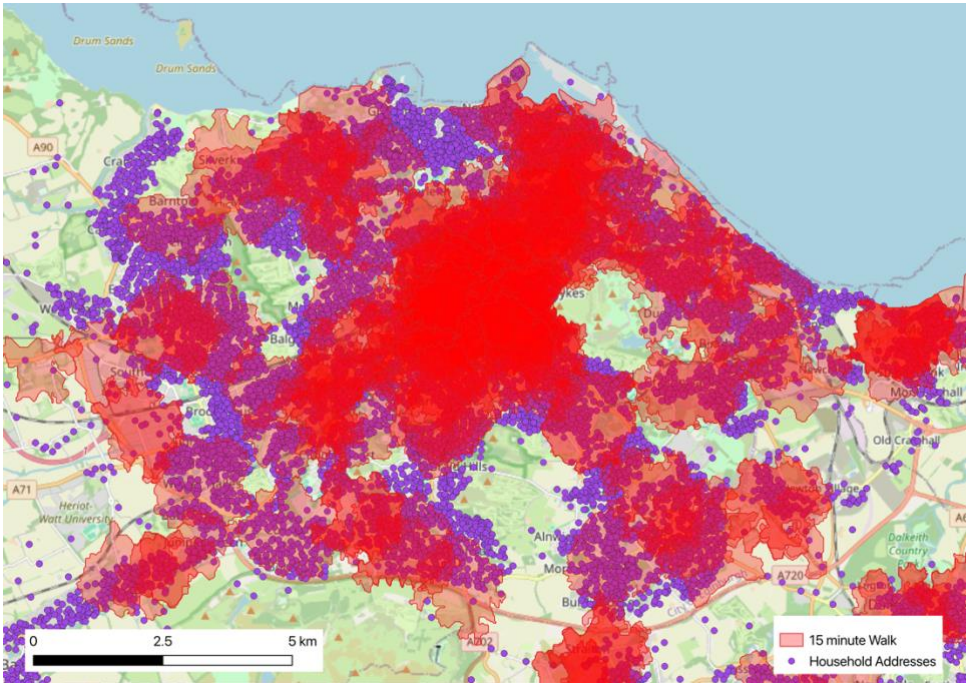
(b) Highlands



In these four urban areas (Edinburgh, Glasgow, Aberdeen, and Dundee), most addresses also had access to a top-10 supermarket within a 15-minute walk. However, in the City of Edinburgh and Glasgow City, 16-17% of households could not access a top-10 supermarket within a 15-minute walk (**Table 10, Figure 3**). The percentage of households that could not access a top-10 supermarket within a 15-minute walk in Dundee City and Aberdeen City was lower, at 10-13%.

Figure 3. Addresses lacking access to a top-10 supermarket retailer within 15 minutes walking in Edinburgh, Glasgow, Aberdeen, and Dundee, indicated by purple dots outside the 15-minute perimeter indicated in red.

(a) Edinburgh



(b) Glasgow

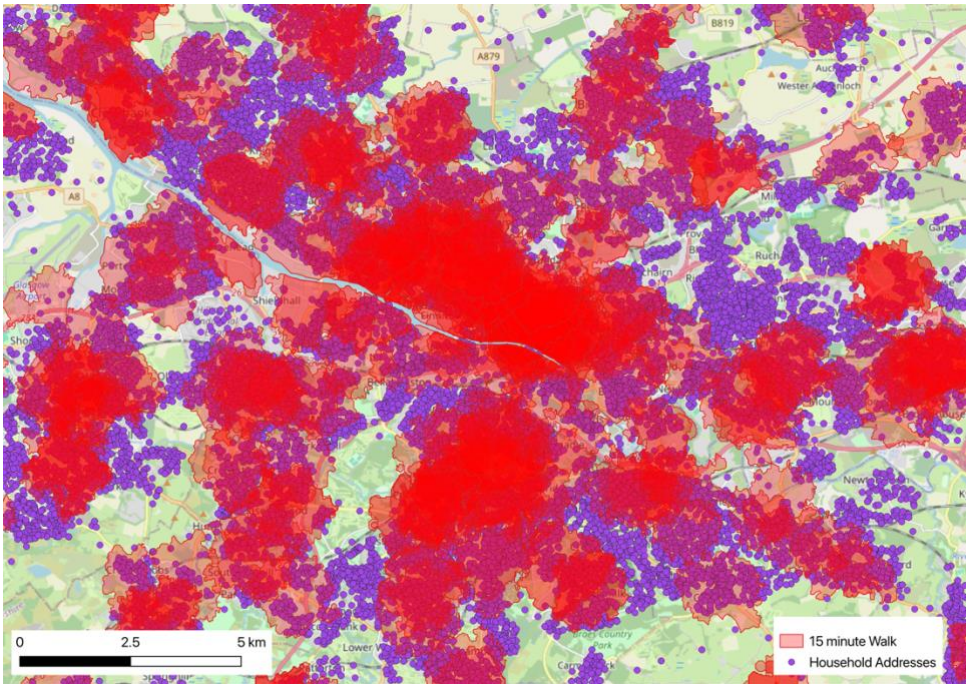
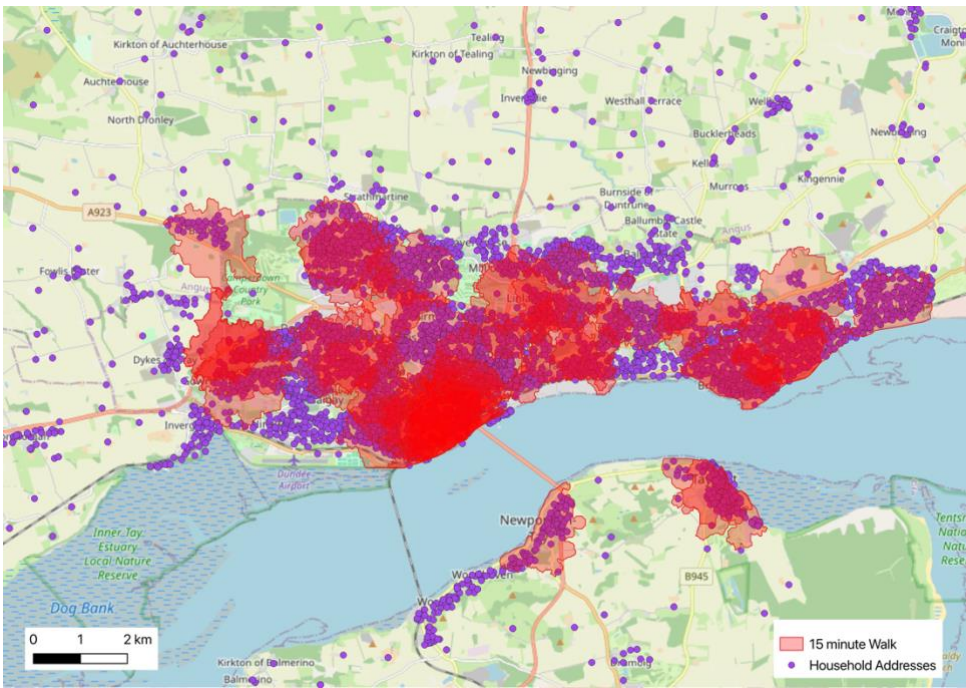
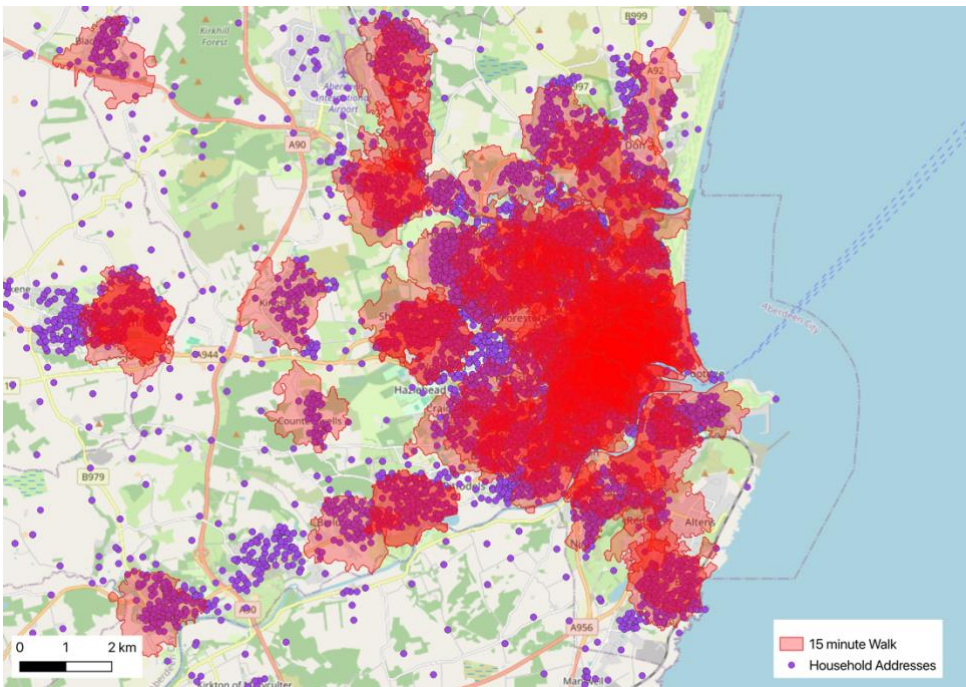


Figure 3. Continued.

(c) Dundee



(d) Aberdeen



4.4. Sensitivity of results to inclusion of additional supermarket retailers, beyond the UK-wide top-10

When Spar, Scotmid, and Londis were included, together with the top-10 supermarket retailers, the percentage of addresses within 15 minutes driving increased from 96% to 97%. Larger increases in accessibility were observed with the addition of Spar, Scotmid, and Londis to walking accessibility, particularly in large urban areas (81% to 88% within 15 minutes walking), other urban areas (73% to 82%), and accessible rural areas (24% to 33%) (**Table 11**). Little impact on accessibility to supermarket retailers within 15 minutes was observed in accessible small towns, remote small towns, and remote rural areas with the addition of Spar, Scotmid, and Londis to the top-10 retailers.

Table 11. Access to top-10 supermarket retailers and top-10 supermarket retailers + Spar, Scotmid, and Londis (top-10+) within 15 minutes according to urban rural classification¹ (2,774,065 addresses).

Indicator	Urban rural classification					
	Large Urban Areas	Other Urban Areas	Accessible Small Towns	Remote Small Towns	Accessible Rural Areas	Remote Rural Areas
15 minutes						
Driving to top-10	100%	100%	99%	82%	94%	51%
Driving to top-10+	100%	100%	100%	82%	96%	55%
Cycling to top-10	100%	100%	97%	81%	57%	27%
Cycling to top-10+	100%	100%	98%	81%	66%	30%
Walking to top-10	81%	73%	76%	62%	24%	18%
Walking to top-10+	88%	82%	79%	62%	33%	20%
Public transport to top-10	89%	78%	79%	64%	27%	19%
Public transport to top-10+	92%	85%	81%	64%	35%	21%

¹ Urban rural classification data were not available for 21,346 addresses.

5. Summary of key findings and conclusions

Most people in Scotland are within 15 minutes driving to a top-10 supermarket retailer

Overall, across all of Scotland, 96% of addresses are within 15 minutes driving to a top-10 supermarket retailer, 93% are within 10 minutes, and 81% are within 5 minutes. Moreover, more than half of addresses were within 15 minutes walking (67%) or via public transport (72%) to a top-10 supermarket.

Supermarket retailers are less accessible in rural areas

About half of addresses in remote rural areas are not within 15 minutes driving to a top-10 supermarket retailer. Addresses outside the 15-minute buffer zone were spread across Scotland, and this was driven by rurality rather than local authority or deprivation. In contrast, there was near universal access to a top-10 supermarket retailer within 10 or 15 minutes driving or cycling in urban areas, and more than 80% of addresses in large urban areas were within 15 minutes via walking or public transport.

Deprivation patterns vary by local authority

In Argyll and Bute, East Ayrshire, and Orkney Islands, addresses in the most deprived areas had lower access to a top-10 supermarket retailer than those in the least deprived. This was true across all modes of transport with the exception of walking in Orkney Islands, which was low and comparable between the most and least deprived areas. In Glasgow City, addresses in the most deprived areas also had lower access via walking and public transport to a top-10 supermarket retailer as compared to addresses in the least deprived areas. Given that lower income households are less likely to have access to a car in Scotland,⁴ disparities in supermarket access via walking and public transport may have especially important implications for healthy food accessibility.

In contrast, in many other local authorities, access to a top-10 supermarket retailer via walking or public transport was higher in more deprived areas than less deprived areas. This included Dumfries and Galloway Fife, Moray, North and South Ayrshire, North and South Lanarkshire, Perth and Kinross, Renfrewshire, Scottish Borders, Stirling, West Dunbartonshire, and West Lothian.

Expanding beyond the top-10 impacts accessibility via walking more so than driving

Expanding beyond the top-10 retailers to include Spar, Scotmid, and Londis had little impact on accessibility within 15 minutes driving. However, in some areas where these additional retailers account for a larger proportion of supermarkets, such as the City of Edinburgh, accessibility via walking increased with their inclusion. Widening the scope of retailers covered by a healthy food standard would not address lack of accessibility in rural areas.

⁴ According to the Scottish Household Survey 2024, 47% of households with an annual income up to £15,000 had access to one or more cars, compared to 96% of households with an annual income of more than £60,000.

6. References

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7. Appendix

The FSA dataset is compiled of individual businesses, these have been summarised below in categories.

Appendix Table 1. *Category of 'Other' supermarket retailers in Scotland*

Category	N (275)	Percent
Convenience	63	22.9%
Farm Foods	45	16.4%
Unknown	37	13.5%
International grocery store	26	9.5%
Home Bargains	24	8.7%
B&M	20	7.3%
Premier	18	6.5%
Miscellaneous	15	5.5%
Nisa	11	4.0%
Specialty	11	4.0%
Boots	1	0.4%
Costco	1	0.4%
Farmers market	1	0.4%
Locavore	1	0.4%
Newsagent	1	0.4%