

Report to Partnership Board Friday 11th September 2026

SCOTTISH ISLANDS PASSPORT UPDATE



PURPOSE OF REPORT

To provide Members with an update on the Scottish Islands Passport Project.

Summary

The Scottish Islands Passport app has reached 71,000 downloads. Work has been commissioned to understand the project's economic impact based on responses from a user survey. Based on the survey responses, the report undertaken by Reference Economic Consultants estimates that the app has already generated an estimated £1.12 million in additional visitor spend over the project's lifetime. Based on a mid-range forecast of future app downloads and its usage, it estimates that the Passport will support £1.25 million in additional annual visitor expenditure by 2030.

Digital app and Website

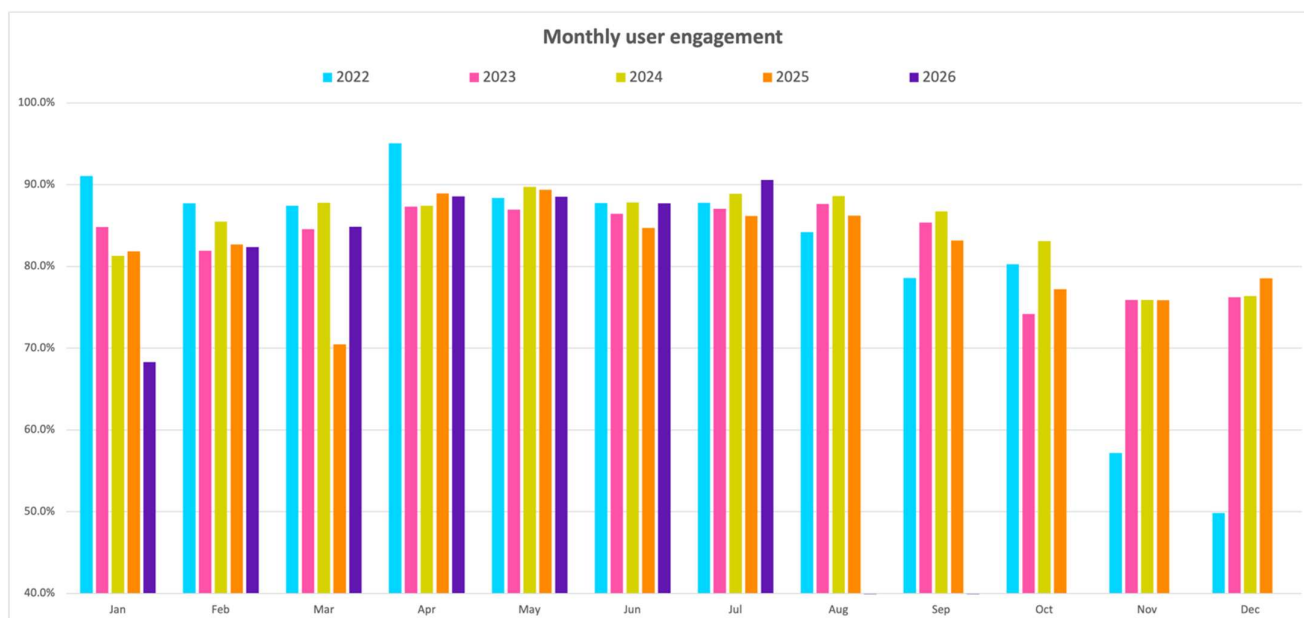
Since our last update, continued growth in app activity has been recorded:

- Over 71,405 app downloads and 430,642 unique sessions from launch to the end of July 2026 (up from 51k and 318k respectively for July 2025).
- The total island stamps collected for each of the 72 islands covered by the app: 81,093 stamp unlocks to date with 52,064 people using the manual unlock option showing that the app is providing inspiration for island visits. New users also collect retrospective stamps for island they have visited in the past.
- We now have data to compare across more than 4 years which shows a continual increase in monthly in location unlocks:



Active usage continues at a high level, outperforming comparable apps in the sector. We can now track the engagement of our users by tracking total users against active users. We have gathered the historical data here and will continue to monitor this. As can be seen below across the years, Scottish Islands Passport continues to have active usage at a high level never dropping below 80%.

	2022	2023	2024	2025	2026 to end July
Total users	24,468	18,708	19,516	21,306	12,998
Active users	19,644	15,705	16,742	17,561	11,045
Engagement percentage	80.3%	83.9%	85.5%	82.4%	85.0%



Since launching in December 2023, we have seen 6,192 travel stamps collected, these are only available when users are in the islands. Walking stamp collection has the highest proportion at 79.6% of collections. The new AI technology is working well within the app with minimal failsafe thresholds being reached.

We now have over 1,100 experiences and travel experiences in the app with the majority of the main development work now completed. There is always scope for further development however the focus now switches to expanding our reach and userbase.

The accessibility overview for each island is now live, this links with our wheel travel category as we aim to improve accessibility information available for our islands. We worked in partnership with travel writers with lived experience of physical disabilities to source this data.

Our website, www.islands.scot, is designed primarily to funnel visitors to the app and provide additional information to compliment the travelogues.

Engagement & working with Partners

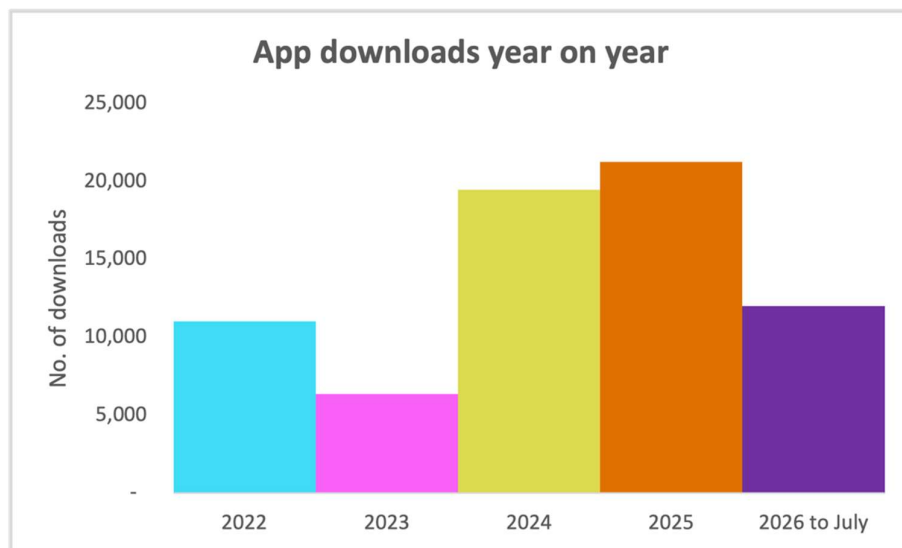
We continue to engage with island businesses and community groups for the final stamp installations, check and refresh content held for each island and as we seek island retailers interested in stocking the travelogues. We also continue to see members of the public make good use of the built-in feedback loop in the app, allowing them to make suggestions on both content and functionality.

Marketing

- A number of marketing displays are now out of contract although will remain until providers find replacements including Glasgow Airport, CalMac ferries and Oban Ferry Terminal.
- We have continual marketing on screens onboard Northlink ferries.
- We are currently rolling out posters for the HITRANS area to be installed in bus stops across the region. If anyone can facilitate with more poster installs in your region, please contact Katy with details.

Our annual download numbers can be seen below, including the effect of scaled back marketing in 2023.

<i>Period</i>	<i>Downloads</i>
2022	11,023
2023	6,374
2024	19,474
2025	21,253
2026 to end July	11,997



We continue with our social media posts across 5 platforms to promote the project, islands, island businesses and events as well as our travel stamps and travelogues. Our following there has now reached 9,666 across the platforms we use.

We have created and promote generic posters for each island with a finalised stamp location which is offered to island businesses for on-island promotion. We engage with island businesses on social media to cross-promote with featured businesses, stamp hosts and stockists with branded assets available to them.

Impact of Scottish Islands Passport

With the continued growth of the app as a dedicated island marketing and visitor engagement tool, we commissioned a report to evaluate the economic impact and future scaling potential of Scottish Islands Passport. We launched a user survey to gather information and the report attached in Appendix 1 evaluates responses of that survey. The analysis is grounded in verified in-location application activity, visitor expenditure data, and survey responses from a sample size of 219 app users. By examining user behaviour, length of stay, geographic distribution and purchasing habits, this report establishes a data-driven baseline to assess how effectively the platform supports regional tourism.

The report provides and number of important insights:

- Validating Return on Investment: The evaluation report identifies that the app generates immediate financial value, including £410,497 in visitor spending in 2025 (£1,119,538 since launch to date).
- Assessing economic dispersal: Part of SIP's aim is to promote balanced and sustainable tourism including moving visitors away from hotspots. The report highlights how the app is facilitating this with 89% of users visiting multiple islands and staying an average of seven to eight nights.
- Supporting SIP business case: With conservative forecasts projecting that the app will help generate up to £1.25 million in annual visitor expenditure by 2030, this analysis provides the strategic justification required for continual investment, platform development and continued partnership working.

The survey continues to be live for users who have not completed it and those responses will be used towards an updated impact report for 2026 after another notification push and social media campaign towards the end of the year to encourage further responses.

Funding & Resource

The RURALITES project continues and allows continuity, with the project manager's contract extended to end October 2027.

We are currently looking for new funding opportunities however what would facilitate these applications is financial support from our partner local authorities. In 2024/25 we received support from the Western isles and ZetTrans in Shetland has contributed in 2024/2025 plus 2025/2026. This support could be aligned with local strategic aims around tourism and/or active and sustainable travel. Support could also take the form of

promotion of the Scottish Islands Passport app across social media channels or websites for example. We are open to discussions around how we could work together to promote the islands in your area to enable increased data capture for mutual benefit.

The project continues to be sustained and achieves development milestones across the 72 islands with less than 1 FTE, demonstrating the principles of Best Value. The project works to deliver against outcomes in active and sustainable travel, balanced and sustainable tourism and thriving island communities.

We have included an updated snapshot of the data for each Local Authority area in terms of in location unlocks from 2023 to date. A sample of each area's monthly unlocks in the islands is included in Appendix 2 at the end of this report and is starting to show trends. With support from each local authority to promote and widen the reach of the app, we could be gathering much more data about what users are doing along with active travel information when travel stamps are collected.

The project has benefitted from initial advertising support which has shown great results but now due to lack of funding opportunities we are looking to utilise HITRANS and councils' assets to build knowledge and userbase of the app. We have started but want to further extend the use of posters we can provide to be installed in bus stops and real-time displays to ensure continued promotion. We would welcome any social media collaborations as we previously worked with Argyll & Bute on and are able to provide all the assets and content to ensure consistent brand voice.

Recommendation

Members are invited to:

1. Note this report and the findings of the Scottish Islands Passport Impacts Analysis Report undertaken by Reference Economic Consultants attached in Appendix 1.
2. Agree that officers seek further engagement with partners for funding support based on the impact captured.

Risk Register

RTS delivery
Impact - Positive
Policy
Impact - Positive

Equality
Impact - Positive
Financial
Impact - Positive

Report by: Katy Beasley

Designation: Scottish Islands Passport Project Manager

Date: August 2026

Scottish Islands Passport Impacts Analysis Report

**Report
for
HITRANS**



July 2026

Executive Summary

Scottish Islands Passport has established itself as an effective island marketing and visitor engagement tool, delivering measurable economic benefits to the 72 islands included, while continuing to attract a rapidly growing user base. Since its launch in 2022, the app has experienced sustained growth, with average annual growth of 33.5% over the last two full years (2023–2025), demonstrating increasing awareness, engagement and value.

Analysis of 219 app users found that Scottish Islands Passport is successfully encouraging visitors to explore Scotland's islands and supporting local economies. Survey respondents were very predominantly leisure visitors (96%), with 94% spending money with local island businesses during their visit. Visitors stayed for an average of seven to eight nights, while 89% visited more than one island, indicating that the app encourages longer stays and wider dispersal of visitors across island destinations. The average spend was £192 per travel group (£56 per visitor).

Using verified in-location app activity and visitor expenditure data, the analysis estimates that the Scottish Islands Passport generated £410,497 of additional visitor spending in 2025 alone, representing significant added value for island businesses and communities. The continued growth in verified app usage suggests this economic contribution will increase substantially over the coming years.

Looking ahead, the outlook is particularly positive. Based on forecast growth scenarios, it is projected to generate between £822,910 and £1,734,879 of additional annual visitor expenditure by 2030, with a prudent forecast of approximately £1.25 million. These projections demonstrate the considerable long-term economic potential of continued investment in and development of the platform.

Overall, the findings confirm that Scottish Islands Passport is delivering tangible economic benefits, encouraging visitors to discover more of Scotland's islands, supporting local businesses, and creating a scalable platform capable of delivering increasing returns as user numbers continue to grow.

1 **INTRODUCTION**

This report analyses the results of an online survey of individuals who have used the Scottish Islands Passport. It is a free app that promotes 72 islands across Scotland. Each island included is accessible by public transport and is also inhabited.

The app:

- Allows users to collect unique passport 'stamps' for each island.
- Allows users to collect as many travel 'stamps' as they take journeys while in the islands (for walking, cycling, wheeling and taking the bus).

It also has:

- An 'island finder' so users can be matched with islands by their interests.
- An overview for each island to help visitors navigate sometimes complicated journeys, as well as links to local organisations for more information.
- Over 1,000 experience listings for visitors to enjoy.
- A travel journal section where users can create and share their island memories.

The aim of the survey was to better understand how the individuals have used the app and the expenditures they made in the islands. The main focus of this report is to consider the visitor expenditures made by those who took part in the online survey.

The online survey ran in 2026 between January 29th and April 10th and achieved 219 responses.

Scottish Islands Passport have an engaged app user base but as launched in 2022 are gathering new users every month. As they have so many new users and to encourage use, as well as a failsafe for any connection issues, the app offers the ability to retrospectively collect island stamps, as well as collecting geo-verified stamps while in the islands. From the app data, they can see many app users find the app and collect their retrospective stamps for islands they have already visited in the past.

This is the first survey Scottish Islands Passport has offered and they are looking to see more information about the project's impact so far. Due to this being the first survey, respondents were asked about their last island visit as a starting point for collecting this information. The project will offer this survey on an annual basis going forward to gather more data each year and consequently ask about that year's visit each year.

2 **ANALYSIS OF RESPONSES**

2.1 **INTRODUCTION**

To ensure it was only app users that completed the survey, teasers to check the app were included in the run up to the survey launch on social media channels but the survey itself could only be reached via a notification message in the app. The survey was hosted on the Scottish Islands Passport website www.islands.scot

2.2 **KEY QUESTIONS**

Trip Purpose

The Table below shows the purpose of the trips that people had made.

Purpose of Trips		
	Number of Respondents	% of Total
Leisure	202	96%
Business	4	2%
Other	3	1%
No response	2	1%
Total	211	100%

The vast majority (96%) of survey respondents were making a leisure trip, with very few respondents citing “Business” or “Other”.

Mode of Transport

The Table shows the mode of transport the visitors used to travel to the island.

Mode of Transport		
	Number of Respondents	% of Total
Car	119	56%
Foot passenger	54	26%
Motorhome	15	7%
Plane	12	6%
Bus	7	3%
Bike	4	2%
Total	211	100%

More than half (56%) used their car to make their journey, with a further 26% travelling as foot passengers by boat. All the other transport modes carried fewer than 10% of the overall passenger numbers.

Number of People in Each Group

The numbers of people in each group are set out below. These are for the 191 respondents that provided a response.

As would be expected the largest numbers of groups are in those with the least number of people. The most common group was those with two people (47% of the total number), followed by a group with just one person (12%). The groups of up to six people accounted for more than 80% of the total number of respondents.

In addition, 12% (27) of those surveyed did not provide a response to this question.

The average (mean) party size was 3.4 visitors.

Number of People in Group		
1	25	12%
2	100	47%
3	16	8%
4	20	9%
5	8	4%
6	11	5%
7	2	1%
8	3	1%
9	1	<1%
12	1	<1%
15	1	<1%
17	1	<1%
27	1	<1%
75	1	<1%
Total	652	-

Spend Per Group

Approach

Respondents were asked three initial questions about their usage of the app. The third question was a yes/no conditional question. If respondents answered yes to “Have you visited at least 1 of the 72 islands since the app launched in 2022?” further questions were revealed about their island visits.

A section note stated “Please answer the next questions thinking about the last trip you took to the islands”. The aim of these two linked questions was to filter respondents down to those who have visited the islands since the app has launched in order to gather as many relevant responses as possible. It is appreciated that this is the first time the data has been gathered and this will allow building the data going forward.

Results

Did you and any other people in your group visit and spend with local island businesses?		
Response	Number of Respondents	% of Respondents
Yes	198	94%
No	10	5%
No response	3	1%
Totals	211	100%

The vast majority (94% of respondents) spent money with local island businesses. The remaining visitors either did not spend money with the local island businesses or did not provide an answer to this question.

Bands of expenditure for each group are shown in the Table below.

Spend Per Group		
Spend Band	Number of Respondents	Total Spend in Band (£)
No Spend	10	0.00
Up to £5	1	2.50
More than £5 and up to £15	5	50.00
More than £15 and up to £25	16	320.00
More than £25 and up to £40	16	520.00
More than £40 and up to £75	27	1,552.50
More than £75 and up to £100	22	1,925.00
More than £100 and up to £150	33	4,125.00
More than £150	74	30,665.00
Blanks (average of the above spend)	7	1,343.73
Total	211	£40,503.73
Average Per Group	£192	
Average Per Visitor	£56	

Note: there are only 211 responses to this question as it was conditional, so the question only appeared if respondent answered 'yes' to the question "Have you visited at least 1 of the 72 islands since the app launched in 2022?".

2.3 COUNTERFACTUAL

The numbers shown above are termed **gross** impacts. They do not account for what could have happened otherwise in the absence of the Scottish Islands Passport scheme. These are termed **additional** impacts.

The following Tables set out what could have happened in the absence of the project.

Would you still have visited that island if you had not been using the app?		
Response	Number of Respondents	% of Respondents
Yes	157	74%
Don't Know/Unsure	35	17%
No-would have visited any of the Scottish Islands	8	4%
Would have visited a different island	8	4%
No response	3	1%
Totals	211	100%

By far the largest response was that 74% of the respondents would still have visited that island had they not been using the app. The other significant response was that one in six (17%) of respondents were “Don't Know/Unsure” what they would have done if they had not been using the app.

The following Table shows the spend by the 24% of those in the survey sample who did not say that they would definitely have visited that island.

Visitor spend by those who did not say that they would definitely have visited that island if they had not been using the app		
Response	Number of Respondents	Total Spend in Band (£)
Don't Know/Unsure	35	6,720
No-would have visited any of the Scottish Islands	8	1,536
No-would have visited a different island	8	1,536
Totals	51	9,792

The above figures account for almost one quarter (24%) of the total spend by the respondents. Two thirds (67%) of the spend (£6,720) was by those who said that they did not know/were unsure that they would definitely have visited that island if they had not been using the app.

A further 16% of the spend (£1,536) said that they would have visited a different island if they had not been using the app. The same amount (16%, £1,536) was identified by those who would have visited any of the Scottish Islands.

Overall, the average spend per group was £192, and the average spend per visitor was £56.

Did you use the app to help plan your trip?		
Response	Number of Respondents	% of Respondents
Yes	99	47%
No	112	53%
Totals	211	100%

Slightly more than half of the respondents (53%) did not use the app to help them plan their trip, while the remaining respondents (47%) did use the app for this.

Did you use the app during your visit?		
Response	Number of Respondents	% of Respondents
Yes	167	79%
No	44	21%
Totals	211	100%

Just over three quarters of respondents (79%) said they used their app during their trip, compared with only 21% who did not use it.

Was your visit a day trip or a longer stay of at least one night?		
Response	Number of Respondents	% of Respondents
Day Trip	49	23%
Overnight	12	6%
More than one night	148	70%
No response	2	1%
Totals	211	100%

More than two thirds (70%) stayed more than one night on the island they visited. A further 23% of visitors made a day trip to the island that they visited. Very few (6%) stayed just one night on the island they had visited.

A total of 148 of the respondents spent at least two nights on the island they visited. The number of nights spent on the islands ranged from two to sixty. The average number of nights spent was between seven and eight.

Did you visit more than one island during your trip?		
Response	Number of Respondents	% of Respondents
Yes	139	89%
No	7	5%
No response	10	6%
Total	156	100%

The vast majority (89%) of the sample had visited more than one island, compared to the 5% that had not. Of the 156 responses to this question, 10 did not include a response.

Some 131 respondents stated the number of islands they had visited. This ranged from 2 to 50 islands. The median number of islands visited was three.

2.3 **GROSSING UP: FROM THE SURVEY SAMPLE TO THE POPULATION OF USERS**

2.3.1 Manual In-Location Unlocks

Within the Scottish Islands Passport, users can collect island stamps in a number of ways in the app. First, manually unlocking island stamps – for islands they have been to in the past before finding the app and by choosing a year of their visit.

2.3.2 Verified Unlocking Methods

Verified unlocking methods all require the user to be on the island at the time of collection:

- Geo-verified within a digital geo-fence that the app recognises via location settings triggers a notification to collect the stamp.
- Manually collecting the stamp when within a geo-fence in the app.
- Choosing the collection option from within the app home screen when within a geo-fence.
- Automatically collecting the island stamp when they collect a travel stamp for that island if they have not already collected it.

- Scanning a QR code at brass stamp locations on each island hosted with local island organisations.

Manual unlocking of stamps can be done anywhere but verified unlocks must occur while users are in the islands.

All the above methods of 'verified' unlocks are classed as 'In-location unlocks' in order to differentiate between unlocks made in the islands and those that are not.

2.3.3 Economic Impact Estimate

Annual in-location unlock numbers from app statistics, along with figures from this survey, have been used to calculate the impact of Scottish Islands Passport into an economic (visitor expenditure) figure.

The survey had 219 respondents. To calculate the spend of verified visitors to the islands, the in-location figures are divided by the survey respondent figure to give a "multiplier". The multiplier is then used to generate the total spend from the survey and thus give a total visitor spend.

From this survey, 24% of respondents are estimated to have visited that island because of the app (see 2.3) and therefore that figure is used to return the conservative, estimated spend attributed to the app. The impacts are shown in the Table below.

First Economic Impact Estimate

Estimate of Total Spend Impacts Per Annum: 2022-2025				
Year	Number of In Location Locks	Multiplier	Total Visitor Spend in the Islands (£)	Estimated Additional Spend Attributable to the App (£)
2026 to 31/05/26	2,708	12.37	500,841	120,201
2025	9,248	42.23	1,710,404	410,497
2024	6,897	31.49	1,275,590	306,142
2023	5,190	23.70	959,883	230,372
2022	1,263	5.77	233,590	56,062
Total To Date Over The Years Shown				1,123,273

Alternative Economic Impact Estimate

An alternative economic impact estimate has also been produced, as set out below. The average visitor spend figure, from the survey responses, of £56 was used.

Some 79% of respondents answered 'Yes' to the question "Did you use the app during your visit?". The number of in location unlocks for each year was multiplied by the average visitor spend. That figure was then divided by the percentage of respondents who used the app during their trip to give the estimated spend of visitors who used the app during their trip.

The results are shown in the Table below and are quite similar to those in preceding Table.

Alternative Estimate of Total Spend Impacts Per Annum: 2022-2025		
Year	Number of In Location Unlocks	Estimated Spend of App Users (£)
2026 to 31/05/26	2,708	119,802
2025	9,248	409,132
2024	6,897	305,123
2023	5,190	229,606
2022	1,263	55,875
Total To Date Over The Years Shown		1,119,538

Future Growth

Looking at the future of the app, the in location unlocks show excellent growth since the launch in 2022 as shown in the Table below.

Year	Number of In Location Unlocks	Annual percentage growth
2025	9,248	34.1%
2024	6,897	32.9%
2023	5,190	310.9%
2022	1,263	-

The percentage increase from 2022 to 2023 is particularly high and so has been excluded going forward. Looking at 2023 to 2024 and 2024 to 2025, an average percentage growth has been calculated of 33.5% based on current full years' data available. This is still a high level of growth but has been used to calculate predicted future growth of what the app might achieve.

Due to this percentage figure being high, a more prudent figure of 25% has also been used in the table overleaf. The percentage increase has been applied each year to the in location unlocks. The estimated spend has then been calculated as previously; by multiplying the number of unlocks by the average visitor spend of £56 then multiplying that number by 79% figure of users who used the app during their trip from the survey responses.

To provide a full range of possible growth, a low figure of 15% has also been included.

The Table overleaf shows that the Scottish Islands Passport could produce an estimated app spend of between around £823,000, £1,249,000 and £1,735,000 additional visitor spend in the year 2030.

Year	In location unlock forecast 33.5%	Estimated Future Spend (£)	In location unlock forecast 25%	Estimated Future Spend (£)	In location unlock forecast 15%	Estimated Future Spend (£)
Forecast Estimates						
2030	39,215	1,734,879	28,223	1,248,570	18,601	822,910
2029	29,375	1,299,535	22,578	998,856	16,175	715,574
2028	22,003	973,435	18,063	799,085	14,065	622,238
2027	16,482	729,164	14,450	639,268	12,230	541,076
2026	12,346	546,191	11,560	511,414	10,635	470,501
Actual Estimates						
2025	9,248	409,132	9,248	409,132	9,248	409,132
2024	6,897	305,123	6,897	305,123	6,897	305,123
2023	5,190	229,606	5,190	229,606	5,190	229,606

APPENDICES

How long have you been using the Scottish Islands Passport app? (Number of Years)		
Response	Number of Respondents	% of Respondents
None	14	6%
0.2	1	<1%
0.25	1	<1%
1	77	35%
2/2.5	47	21%
3	45	21%
4	15	7%
5	19	9%
Total	219	100%

How many island stamps have you collected out of 72?		
Response	Number of Respondents	% of Respondents
1 or 2	52	24%
3-5	43	20%
6-10	36	16%
11-20	43	20%
21-30	27	12%
31-40	10	5%
41-50	4	2%
51-60	2	1%
More than 60	2	1%
Total	219	100%

Have you visited at least 1 of the 72 islands since the app launched in 2022?		
Response	Number of Respondents	% of Respondents
Yes	211	96%
No	8	4%
Total	219	100%

Did you find out about any new islands from the app?		
Response	Number of Respondents	% of Respondents
Yes	152	69%
No	67	31%
Total	219	100%

How many different trips did you take to these islands since the start of 2022?		
Response	Number of Respondents	% of Respondents
Zero	12	8%
1	26	17%
2	23	15%
3	25	16%
4	13	9%
5	9	6%
6-8	14	9%
9-10	2	1%
11-15	4	3%
18-23	2	1%
No response	22	15%
Total	152	100%

Note: this question only appeared if respondents answered yes to the question "Did you find out about any new islands from the app?"

Was this your first trip to one of the 72 islands covered by Scottish Islands Passport?		
Response	Number of Respondents	% of Respondents
Yes	61	28%
No	150	68%
No response	8	4%
Total	219	100%

Did you stay overnight in more than one island during your trip?		
Response	Number of Respondents	% of Respondents
Yes-at least 2	77	49%
No-only 1	59	38%
No response	20	13%
Total	156	100

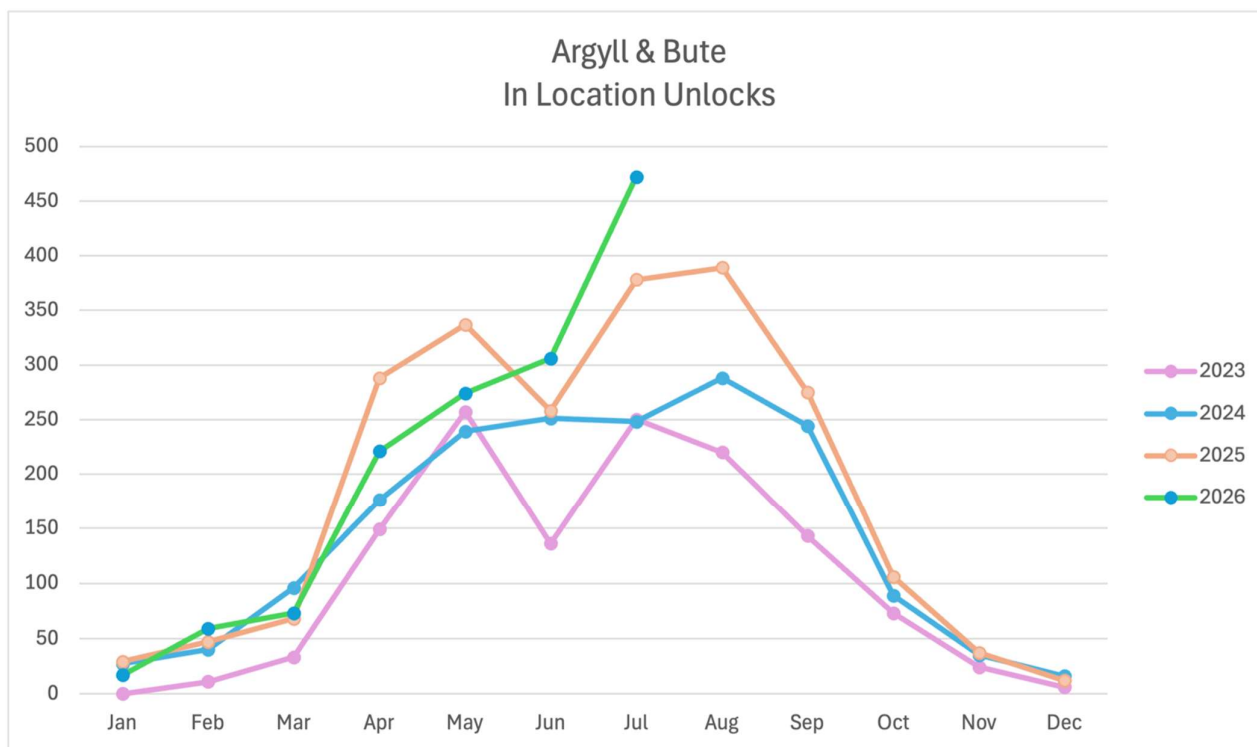
Note: this question only appeared if respondents answered yes to the question "Did you find visit more than one island during your trip?"

Respondent Place of Residence		
Response	Number of Respondents	% of Respondents
Scotland	114	52%
UK Outside of Scotland	72	33%
Outside UK	31	14%
No response	2	1%
Total	219	100%

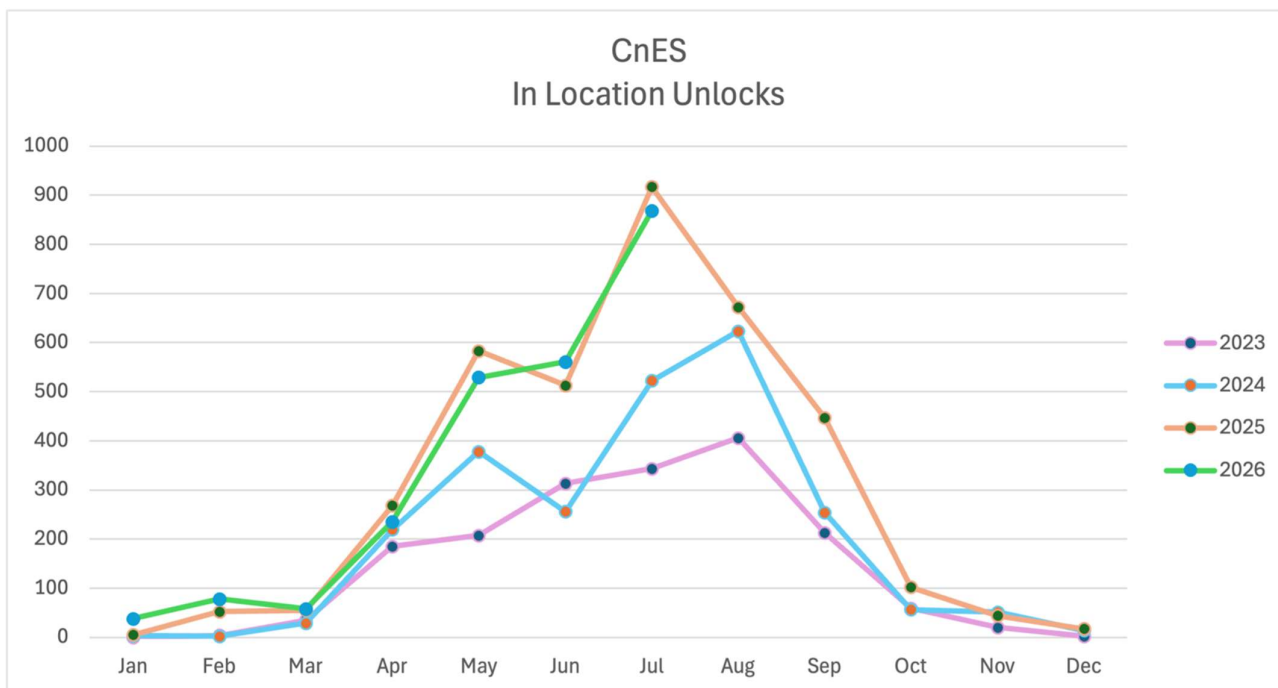
Age of Respondents		
Response	Number of Respondents	% of Respondents
16-24	11	5%
25-34	47	21%
35-44	49	22%
45-54	40	18%
55-65	34	16%
66+	32	15%
No response	6	3%
Total	219	100%

Appendix 2: Sample Local Authority data

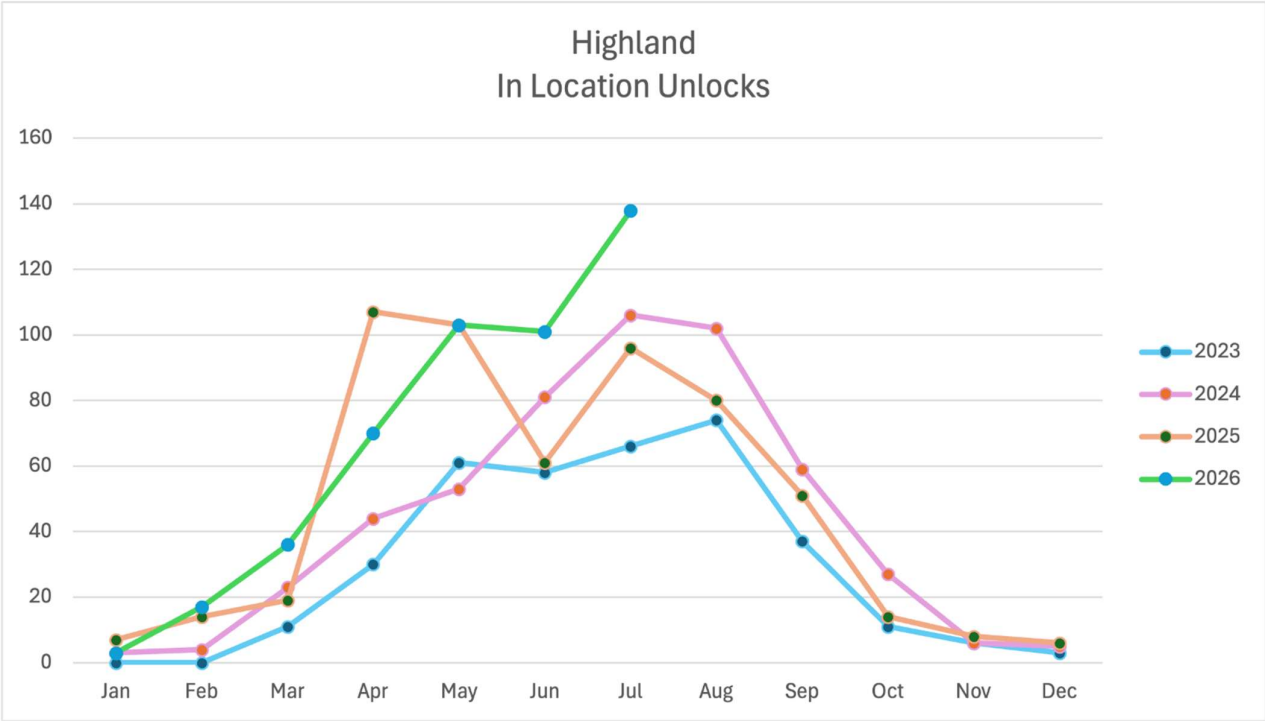
Argyll & Bute – 16 islands



Comhairle nan Eilean Siar – 15 islands



Highland – 7 islands



Orkney – 17 islands

