

RBFF Online Fishing License Assessment



June 2020

online license process project background

The rise of e-commerce and m-commerce over the last two decades has completely transformed the way Americans shop. With each passing year, more and more consumers are purchasing a broader range of goods and services online with the idea that it is more convenient and less expensive than visiting an actual storefront. The number of online shoppers in the United States in 2019 reached 263 million, a 42% jump from 184 million in 2012; the last time RBFF conducted similar research. **Even more, that number is projected to increase further to 283 million by 2024.**

Additionally, the number of people who shop online via web browser or app on a mobile device has grown to 187 million, which is a 99% increase from 2012 figures (94 million).

The following slide outlines RBFF's goals for this 2019 online license project and given various e-commerce trends, all licenses in this project were purchased from a mobile device.



online license process project background

In November 2019, RBFF commissioned MarketViewpoint, a mystery shopping company to lead a project in which shoppers purchased an online resident fishing license in all 50 states, plus the District of Columbia. The goal of this study was to track improvement and progress over time since the last research study in 2012.

Results from the study can be found in this report. Additionally, comparisons from 2012 to current (2019) are included, as applicable. Of note, and improvements to the 2019 project include: 1) all licenses were purchased from a mobile device 2) shoppers were asked to ‘search for and purchase a fishing license’ from indicated state (vs starting the purchase process on the state agency website 3) shoppers purchased a resident fishing license.



online license process

executive summary

We encourage you to read the full report included here, however high-level results and opportunities are noted below:

- **Mobile-friendly:** all licenses were purchased successfully from a mobile device in 2019. Only 5 states offered a mobile experience in 2012.
- **Email collection:** 40 states require mandatory email collection (up from 25 states in 2012)
- **# of steps to complete purchase** – The opportunity exists to minimize the number of steps a customer takes to complete a purchase. Consider mandating a customer account complete w/recent or frequent purchases. Many states have 10+ steps.
- Consider offering **auto-renew** options so customers can be licensed each year. **Thirteen** states offered this option.





outline



01 – process & methodology

02 – results & findings

03 – opportunities & comparisons

04 – conclusions & trends

process & methodology



WHO

One mystery shopper from all 50 states, plus D.C., set out to purchase a fishing license online in their respective state. A total of 51 licenses were purchased.



WHAT

Shoppers purchased a resident annual fishing license from a mobile device and were only given instruction to ‘open your preferred browser and purchase a fishing license in your state.’ RBFF provided guidance on various steps to record along the way.



WHEN

The various shopping commenced in November 2019, with all licenses purchased by end of December 2019.





results & findings



results & findings

general

day of week

93%
of shoppers purchased
Monday-Friday

7%
of shoppers purchased
on the weekend
(Saturday & Sunday).

preferred browser

63%
used Google Chrome

25%
used Safari

4%
used Microsoft Edge

8%
used Firefox or other

search results

49 licenses purchased
from official state agency
website

2 licenses purchased from
a SCAM website appearing
to sell fishing licenses*



*two licenses purchased from scam websites were later repurchased successfully from state agency websites

results & findings

license details

license cost

78% of states:
\$30 or less (40 states)

10% of states:
\$30-40 (5 states)

12% of states:
\$40 or more (6 states)

license term*

38% offered calendar
year (19 states)

29% offered 365-day
from purchase (15 states)

language options

8% of states offer multiple
languages

4 states; Spanish



*some licenses purchased Nov. 2019 only allowed shoppers the opportunity to fish for two months; missing an opportunity to upsell

*bulk of states fell into calendar or 365-day category; remaining offer variable term start dates (March, April, July, etc.)

results & findings

user process

mobile-friendly

All licenses were purchased from a mobile device

customer account*

78% of states **required** an account be created to complete the license purchase (40 states)

email collection**

80% **mandatory** email collection (40 states)

13% **opt-in** selection (7 states)

7% **opt-out** selection (4 states)



*remaining states did not require a customer account be created
**all states requested an email address be given when purchasing a license

results & findings

purchasing a license

customer data collected*

73% collect information related to driver's license (37 states)

40% collect information related to social security (20 states)

of pages to make the license purchase

22%: 5 pages or less (11 states)

45%: 6-10 pages (23 states)

33%: 10+ pages (17 states)

how complicated is the process?

In **36 states**, the shopper found the process to be **uncomplicated or mostly uncomplicated.**

If complicated, top reasons were too many clicks, too many mandatory fields, too much personal info.



*most states collect more than one type of customer data

results & findings

regulations + proof of license

fishing regulations

41% of states provide fishing regulations immediately after purchase via email or pop-up screen (21 states)

obtaining a license*

50% offer email option (25 states)

68% offer print-screen (35 states)

21% offer hard copy via mail (11 states)

license authenticity

39% offer digital version of license as proof of license, rather than needing a physical copy (20 states)



*more than one license option available in most states

results & findings

general

auto-renewal

25% of states offer auto-renewal opportunity
(13 states)

follow-up communications

43 states followed-up AFTER license was purchased to say “thank you” and provide email confirmation the license was purchased

sign-up for e-news

55% of states offer opportunity to sign-up for e-news (28 states)



「opportunities & comparisons」

high-level comparisons

2012 vs. 2019



WHO

2012 – one shopper purchased a license from all fifty states (same shopper)
2019 – one shopper purchased a license from all fifty states, plus D.C.
(different shoppers in various states)



WHAT

2012 – non-resident, short-term fishing license (shortest term possible)
2019 – resident, annual fishing license



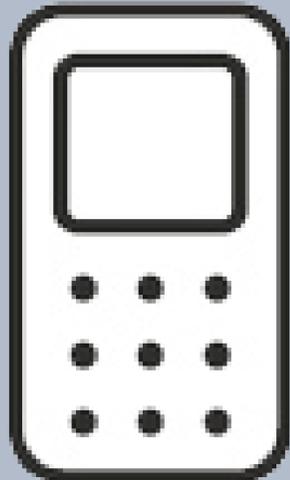
WHAT

2012 – one person visited every state agency homepage; purchased a license and recorded customer experience at each stage
2019 – multiple people were asked to ‘search for and purchase’ a fishing license from a mobile device, and record details throughout the purchase process



opportunity #1: mobile

With the continued rise of e-commerce and mobile/device usage, it's imperative organizations and companies provide consumers the opportunity to purchase any good or service online.



In 2012, only five states offered a mobile experience.

In 2019, all licenses were purchased from a mobile device, showing 10x growth over the last six years.



opportunity #2: email collection

While limiting the amount of personal information collected necessary to purchase a license is valuable, agencies should collect email addresses on a mandatory basis. This provides an efficient, inexpensive way to communicate, market and further relationships with customers.



*In 2012, 25 states **required** customers to provide an email address. In 2019, that number jumped to 40 states.*

*Additionally, email collection was **optional** in 22 states in 2012, and was not asked by three states in 2012.*

The remaining 11 states in 2019 offered email opt-in (7) or email opt-out (4).



opportunity #3: license process/steps

Simplifying the number of steps it takes a customer to purchase a good or service is imperative to decrease 'abandoned cart' rate. Consider the internet greets with 1-2 clicks to purchase an item.



In 2012, we tracked # of clicks to the license page; average was 2 clicks; with ~7 pieces of demographic data collected.

In 2019, we tracked # of steps to complete the process. Five clicks/steps or less in 11 states; 10+ clicks/steps in 17 states.

The opportunity exists to simplify and minimize these numbers by mandating customer account sign-up.



opportunity #4: language

Providing the option to translate websites, fishing license descriptions, purchase instructions, FAQs, etc. into Spanish would help in attracting the 58+ million Hispanic Americans; the nation's largest ethnic minority and fastest-growing segment.



In 2012, one state offered translation into Spanish.

In 2019, four states offered translation into Spanish.

Huge opportunity exists for more states to offer this option, especially with currently 4.4 million Hispanics participating in fishing.



opportunity #5: auto-renew

Auto-renew can provide convenience and ease for both the customer and organization, and helps organizations determine loyal customers and annual revenue. Consider offering an incentive or discount for signing-up.



In 2012, we did not investigate auto-renew options.

In 2019, 13 states offered auto-renew option.



opportunity #6: thank you + follow-up

Personalized communication, especially a 'thank you message' is standard procedure in today's world of online shopping. Openly expressing appreciation provides reassurance the transaction has been completed, and provides a bridge towards a continued positive relationship.



In 2012, 25 states did not provide a follow-up confirmation to customers stating 'thank you for your purchase.'

In 2019, that number dropped to 8 states, suggesting a commitment to improvement over time.





conclusions & trends

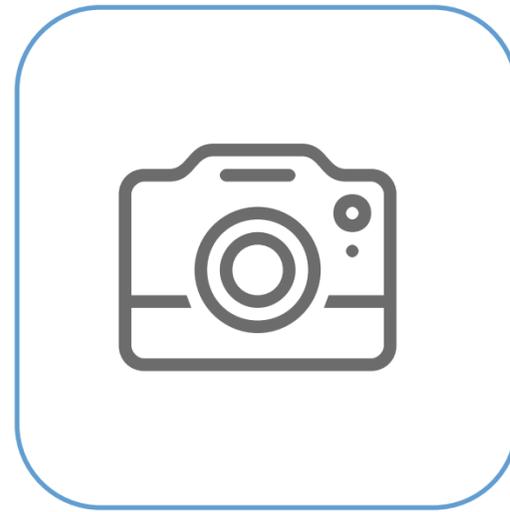


conclusions & next steps

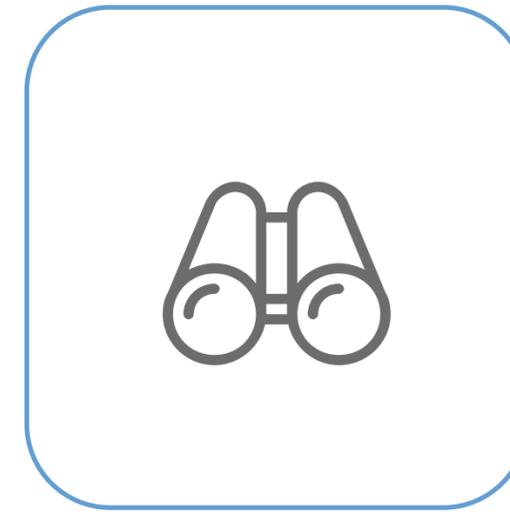
Progress has been made since the initial online license assessment project in 2012; however many opportunities remain to bolster retention and reactivation efforts individually within each state, essentially making it easier to purchase and renew a fishing license. RBFF recommends continuing to focus on the following:



Follow consumer trends



Collect and utilize data
(personalization)



Go where the people are
(urbanization; online
shopping)



Thank You



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