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EXECUTIVE SUMMARY

As business becomes increasingly borderless, companies are relying on webinar technology to communicate with their customers, prospects, employees and partners. For marketers, webinars have evolved from simply being a tool for generating new leads to playing an important role in driving prospects through the entire buying cycle.

With the economic recovery in 2013, companies leveraged webinars to expand into new markets, find new audiences and develop a “global voice.” This was also the year that webinars became increasingly interactive, providing a more engaging audience experience. The results of this report show growing audience sizes, increased viewing duration and growing audience demand for webinar content on demand, highlighting why webinars continue to play a critical role for successful companies.
EXECUTIVE SUMMARY [CONTINUED]

METHODOLOGY

The findings in this report were compiled by ON24, the global leader in webcasting and virtual environments. In 2013, ON24 supported over 26,000 webcasts globally, and this report is based on a random subset of those events. Variables were measured from webcasts that included the following criteria:

- Webcasts held between January – December of 2013
- Conducted from a cross section of 500+ organizations
- 7,055 webcasts were measured in the analysis
- Company size ranges from large enterprise to SMB

This study measured statistics across the entire lifecycle of a webinar, including: webinar promotion and registration metrics, webinar interactivity metrics, audience viewing habits and both live and on-demand attendance and conversion metrics.

Unless noted otherwise, webcasting event types are defined as:

- Live webinars: audio or video-based events that are streamed on a specific day and time.
- On-demand webinars: audio or video-based events that are streamed upon request anywhere, anytime. These also include live webcasts that have been archived for additional viewing.
- Audio webinars: events that are streamed with audio plus slides.
- Video webinars: events that are primarily streamed with video or include video clips.

Unless noted otherwise, audience information is defined as:

- Registrants: people who registered to view an event.
- Attendees: people who registered to view an event and attended that event.
PRE-WEBINAR BENCHMARKS

DRIVING WEBINAR REGISTRATION

This year’s benchmarks on webinar promotion highlight the expanding opportunity to drive registration over longer periods of time. The promotional cycle for webinars continues to grow, enabling companies to increase the number of email drops and messages they deploy to drive webinar registration and attendance.

PRE-WEBINAR BENCHMARKS

PROMOTIONAL CYCLE

Registration Percentage By Event Proximity:

- 58% Register the week of the live webinar
- 42% Register over one week before webinar

- 16% 21+ Days
- 26% 7 to 14 Days
- 30% 1 to 7 Days
- 28% The day of
BEST DAYS TO SEND PROMOTIONAL EMAILS

To gauge the success of webinar promotions, we measured registrants by day of the week, which directly corresponds to email drops. Webinar benchmark data over the past few years shows the middle of the week to be the best days to drop promotional emails, with Tuesday, Wednesday and Thursday significantly outperforming the rest of the week. The only notable change from last year’s report is that Thursday jumped four percentage points to become the number one day that webinar registrations occurred.

BEST DAY FOR PROMO EMAILS

Days With Most Registrants:

<table>
<thead>
<tr>
<th></th>
<th>MON</th>
<th>TUE</th>
<th>WED</th>
<th>THU</th>
<th>FRI</th>
<th>S/S</th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td>17%</td>
<td>23%</td>
<td>22%</td>
<td>24%</td>
<td>11%</td>
<td>2%</td>
</tr>
</tbody>
</table>

Previous Year:

<table>
<thead>
<tr>
<th></th>
<th>MON</th>
<th>TUE</th>
<th>WED</th>
<th>THU</th>
<th>FRI</th>
<th>S/S</th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td>18%</td>
<td>24%</td>
<td>22%</td>
<td>20%</td>
<td>12%</td>
<td>4%</td>
</tr>
</tbody>
</table>
PRE-WEBINAR BENCHMARKS [CONTINUED]

BEST DAYS FOR WEBINAR ATTENDANCE

The middle of the week is not only the best time to promote webinars; it’s also the best time to hold your webinars. This year, there was a three-way tie for days with the highest webinar attendance, with Tuesday, Wednesday and Thursday all delivering 27% attendance rates. The drop-off on the other days of the week is large enough to be prohibitive, depending on industry and audience.

BEST DAY FOR ATTENDANCE

Days With The Highest Registered Attendance:

- **Monday:** 10%
- **Tuesday:** 27%
- **Wednesday:** 27%
- **Thursday:** 27%
- **Friday:** 7%
- **Saturday/Sunday:** 1%
WEBINAR BENCHMARKS

CONVERSION RATE

REGISTRANT TO LIVE ATTENDEE

AVERAGE

42.9%

REGISTRANT TO ATTENDEE CONVERSION

Over the past few years, the average registrant-to-attendee conversion ratio has remained steady. This year’s benchmark increased one percentage point from 42% to 43%. The year-over-year consistency of this data enables companies to accurately predict attendance outcomes before a webinar even goes live. Companies that are not achieving this benchmark should look at the pre-registration benchmarks to see where improvements can be made.

Note: The data in this report primarily comes from marketing-driven webinars; however, there is a small percentage of internal communications events in this study which has a higher attendance rate. Marketing webinars should have a 35%-43% conversion ratio.

WEBINAR ATTENDANCE

This report also measured events by total webinar attendance to gauge the overall growth of audience size. The baseline measurement started at events over 100 attendees to eliminate usage of webinars for smaller meetings and conference calls. There has been significant growth in events over 200, 300 and 500 attendees, with the largest growth coming in the 300+ attendee benchmark. There was a slight decline in events with over 1,000 attendees, which was likely a result of large companies running higher numbers of webinars, increasing their overall audience capture but decreasing the attendees of individual events.
AVERAGE WEBINAR VIEWING TIME

Perhaps the most significant trend in the Webinar Benchmarks Report over the past few years has been the steady increase in the average viewing time for live events. This year, the average viewing time increased from 53 to 56 minutes. When you consider that most webinars in the study are one hour long, the data shows that audiences are staying engaged for almost the entire duration of a presentation. This data counters the common assumption that viewers have short attention spans and are hungry only for short form, or “snackable,” content. Webinars seem to be the exception to that rule, as audience viewing time continues to rise.

AVERAGE VIEWING TIME TREND

AVERAGING IN LENGTH BETWEEN 45-60 MINUTES

2010 2012 2013

38 MIN 53 MIN 56 MIN

AVERAGE VIEWER TIME

AVERAGE VIEWER TIME

AVERAGE VIEWER TIME
AUDIENCE ENGAGEMENT BENCHMARKS

One of the major evolutions over the past few years is the increasing level of interactivity in the webinar experience. This year we measured both the use of interactive tools and the audience engagement with those tools. While adoption of many of these interactive tools is still growing, we see some tools like live Q&A becoming standardized across most events. It is also important to note the increased use of social media applications, enabling audience members to share noteworthy content or even the event itself. Based on this growth, we anticipate that webinars will become increasingly “social” over the next few years.

ENGAGEMENT METRICS

RESPONSE TO ENGAGEMENT TOOLS

<table>
<thead>
<tr>
<th>Tool</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chat</td>
<td>4%</td>
</tr>
<tr>
<td>Social</td>
<td>38%</td>
</tr>
<tr>
<td>Collaboration</td>
<td>4%</td>
</tr>
<tr>
<td>Polling</td>
<td>22%</td>
</tr>
<tr>
<td>Surveys</td>
<td>10%</td>
</tr>
<tr>
<td>Audiences Ask</td>
<td>5%</td>
</tr>
<tr>
<td>Audience Resp</td>
<td>21%</td>
</tr>
<tr>
<td>Audience Down</td>
<td>12%</td>
</tr>
</tbody>
</table>
INTEGRATION OF VIDEO INTO WEBINARS

This is the first year that we measured the use of video in webinars, as a majority of events continues to be audio- and slide-based presentations. The video benchmark includes webinars using webcams, video clips and/or full studio video production. While the adoption of video is still statistically small, we anticipate that this number will rise significantly over the next few years, as video technology is now more cost-effective and accessible.

INTEGRATION OF WEBCAST

VIDEO

9%
ON-DEMAND VIEWING

As viewing habits evolve, it’s become increasingly important to measure the size of the audience that views webinars on demand, after the live date is over. This year we measured that statistic in two ways:

1. On-demand viewers who registered for the live event
2. On-demand viewers who registered after the live event

Of on-demand viewers who pre-registered for the live webinar, 13% viewed both the live event and the on-demand webinar, while 87% only viewed the webinar on demand. Repeat viewing likely reflects attendees who viewed live but were unable to complete the webinar, turning to the archived version to catch up on what they missed – a trend that underscores the importance of making webinars available on demand after the live dates have passed.

Also noteworthy is the “long tail” of people who are responding to post-live promotions and are registering for webinars after the live webinar is over. While the majority of post-live registrations occurs in the four weeks following the live webinar, registrations continue steadily beyond 12 weeks. This data validates the idea that webinar content has increased value and is more than simply a moment in time.

ON-DEMAND REGISTRATION

POST LIVE EVENT

![Graph showing post-live event registrations over 12 weeks](chart_image)
ON-DEMAND VIEWING DURATION

To further understand audience behavior, we also measured the viewing duration of on-demand attendees. The viewing duration dips from 56 minutes to 26 minutes on demand. There are likely a number of reasons for the statistical change, including:

1. Some on-demand viewers also viewed live and simply needed to catch up on missed content.
2. Most on-demand webinar tools enable audience members to fast forward through webinar content, allowing them to find the content that they are particularly interested in.
3. On-demand webinars can be viewed multiple times.

INTEGRATION INTO VIRTUAL ENVIRONMENTS

The final statistic we looked at was the number of webinars that were being integrated into a larger virtual environment. These virtual environments often include: virtual executive briefing centers, virtual marketing events, customer or partner content portals, and virtual training environments. Of those webinars that were integrated into virtual environments, some were created uniquely for that environment, but many were simply live webinars that were later re-used as on-demand content in a virtual portal, further increasing the value of that content.
CONCLUSION

This year’s Webinar Benchmarks Report reflects the increasingly important role that webinars play for both companies and viewers. While there has been consistency in many of the registration benchmarks, there are some important year-over-year trends: audience sizes are growing, viewing time is increasing, webinars are becoming more social and interactive, and on-demand viewing has extended the lifecycle, and value, of the average webinar. This benchmark data can be used as a guideline for creating, promoting and delivering successful events.
ABOUT ON24, INC.

ON24 is the global leader in cloud-based solutions for webcasting and virtual communications. ON24 offers a broad and innovative product portfolio accessible from any device and supported by industry-leading reporting and analytics. More than 1,000 organizations, including IBM, CA Technologies, Merck, JPMorgan Chase, Deloitte, Credit Suisse, Rosetta Stone, Ernst & Young and SAP, rely on ON24. Applications for the ON24 platform include demand generation, customer engagement, talent development and town hall meetings. The company is headquartered in San Francisco, with offices throughout the world. For more information, visit http://www.ON24.com.

For more information on the benefits of the ON24 platform, contact us at 877-202-9599 or visit www.ON24.com.