ON24 WEBINAR BENCHMARKS REPORT

2019

ON24

CONTENTS

EXECUTIVE STATEMENT

At ON24, we believe that in a world where there is so much digital noise, only the best experiences truly stand out. And the best experiences are the ones that put the audience first.

Webinars allow you to do that. Your audience can access them live or always-on. They can tune in wherever and whenever is best for them. They can ask questions from you, and you can ask questions of them. All of this opens and strengthens a human connection, which you can then enhance with interactive features such as polling and surveying, video content and resources they can download to help support them on their journey.

Most importantly, all this engagement provides a rich stream of data to allow you to close the loop, understand what's working well and what you can improve on. This will allow you to make your webinars become even better over time.

To help you get started, we've analyzed all webinar benchmark data on our platform in 2018 for this annual report. And to stick to our word, we've also innovated—this year contains survey responses

from our community of Webinerds in addition to the core data we've featured year-on-year.

So come on in, and find out how your peers are doing—and how you can get even better at your webinars.

METHODOLOGY

ON24, the world's leading platform for data-driven webinars and interactive content experiences compiled the data in this report from a random number of ON24 webinars conducted globally in 2018.

ON24 measured 22,922 webinars in this analysis

All webinars were held between January and December of 2018

All webinars had at least 100 attendees

Events represent a cross-section of more than 1,600 organizations

Companies range in size from Enterprise to SMB

In addition, more than 200 ON24 users were surveyed to add further insight to data emerging from the platform.

This study examines statistics across a webinar's lifecycle, including webinar promotion and registration metrics, interactivity metrics, audience viewing habits, and both live and always-on attendance and conversion metrics. Unless otherwise noted, this study uses the following definitions:

Live webinars—Audio or video-based events streamed on a specific day and time.

Always-on webinars—Audio or video-based events attendees can view always-on, including archived live webcasts.

Registrants—Prospects registered to view an event.

Attendees—Prospects who registered to view an event and attended that event.

WEBINAR SUCCESS

WEBINAR VOLUME

89% of those offering webinar-based training say they can easily grow their programs.

Webinars lend themselves to all kinds of communication activity. At ON24, we see three use cases that come up the most frequently—marketing, training and continuing education—and many organizations carry out all three.

The number of webinars a company delivers per year varies according to its audience, resources and business goals. There is no right answer—it's the quality of the content, rather than the number of webinars you produce, that determines whether your webinar program is successful.

The vast majority (86 percent) of respondents using webinars for marketing run up to 150 webinars in a given year, with over half (57 percent) running up to 50.

Eight in ten (80 percent) organizations providing training webinars produce up to 100 webinars in a given year, with the remainder delivering more than 100. The vast majority (96 percent) plan to increase the number of webinars they produce in the next 12 months.

Nine in ten (93 percent) respondents using webinars for continuing education offer up to 150 webinars a year.
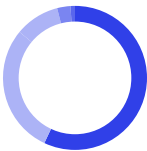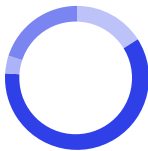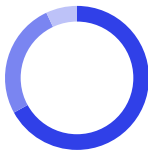
Marketing		**Training**		**Continuing education**	
1-50:	57%	1-10:	16%	1-50:	67%
50-150:	29%	10-50:	60%	50-150:	26%
150-300:	10%	50-100:	4%	150-300:	7%
300-600:	3%	> 100:	20%	300-600:	0%
> 1,000:	1%			> 1,000:	0%

ON24 TIP

MAKE SURE TO PRODUCE A REGULAR STREAM OF WEBINAR CONTENT.

Don't fall into the trap of seeing webinars as just a tactic to add on to the end of your marketing campaigns or education and training efforts. Instead, make them a regular and frequent part of your marketing activity. As you run more sessions, you'll find out what works for your audience—allowing you to continuously improve performance.

PERSONALIZATION

91% say ON24 makes personalizing webinars easy.

For marketing

With account-based marketing (ABM) becoming the new standard in modern marketing strategies, personalization has moved front and center. Organizations can add a higher level of engagement to their ABM programs by creating customized webinars for specific accounts, industries or use cases.

Our research shows that around two-thirds (68 percent) of respondents personalize webinars to their audience and just over a third (35 percent) produce one-to-one webinars for targeted accounts. Nearly nine in ten respondents (86 percent) reach out to multiple audiences with a single webinar. Particularly in the case of strategic ABM, which focuses on a one-to-one approach to targeting accounts, webinars can be tailored for individual accounts and packaged around content

that is most likely to drive engagement from a particular company.

The degree and types of personalization vary, typically depending on the goals of the webinar program. Targeting specific verticals (62 percent) was most commonly cited by respondents. When it comes to engaging targeted accounts, sharing best practices (50 percent) and giving product demonstrations (42 percent) are used most frequently, with pitching to specific accounts (29 percent) ranking further down the list.
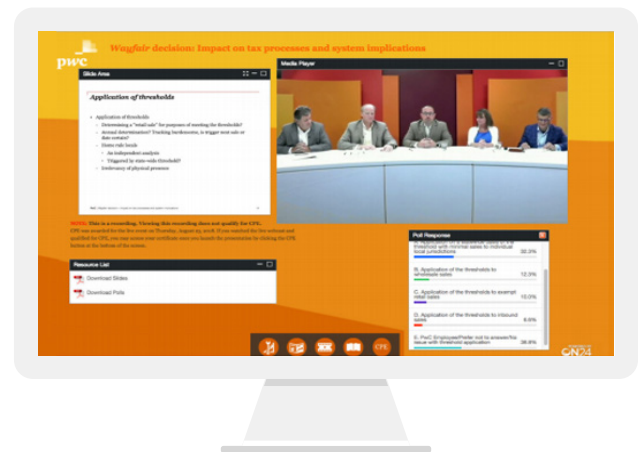
ON24 TIP

PUT WEBINARS AND OTHER CONTENT IN ACCOUNT-TARGETED PORTALS.

To increase the impact of your account-based campaigns, package up your content in portals that are branded specifically for your target prospects. You can even edit your videos or webinars to highlight key sections. Read our Webinerd's Guide to Account-Based Marketing to find out more.

PERSONALIZATION

39%
of those running education say it's easy to generate programs. Just 9% say it's 'hard'—but this is largely due to industry association challenges.

For training and continuing education

For respondents delivering webinar-based training programs, 66 percent serve external customers and users, 38 percent deliver to internal staff and 10 percent broadcast to industry peers.[1]

Tailoring these sessions to the target audience improves its effectiveness. On average, respondents offering training programs rate the ease of customizing webinars as 7.38 on a ten-point scale.

More than a third (39 percent) of those in continuing education said it was 'easy' to generate programs using webinars. As for the main reason,

47 percent put their success down to a well-defined process, while 24 percent say it's the technology that makes it easy. The remainder credit having a strong team (18 percent) and drawing on lots of quality material (12 percent).

1. Respondents could select more than one option.

ON24 TIP

CUSTOMIZE YOUR WEBINAR CONSOLE TO DRIVE ENGAGEMENT.

Take advantage of the webinar environment to build a connection between the attendee and your brand. A fully branded, customized webinar console helps you set your program apart from the get-go. Read our Webinar Console Branding Guide to learn how you can achieve this.

USE OF POST-WEBINAR DATA

53% say it's 'extremely important' to have access to engagement insights.

Ensuring that your webinar platform, along with the channels used to promote your webinar program, are integrated with your technology stack is essential. For example, integrating webinar data with a CRM system means that sales teams can have immediate access to insights about their accounts and are able to provide more targeted follow-up.

Encouragingly, nine in ten (88 percent) respondents integrate their webinars with a CRM or marketing automation platform. Six in ten respondents (63 percent) claim they can pass webinar insights to sales very or quite fast (4 or 5 on a five-point scale). Only 11 percent of those surveyed say they're slow at passing these insights to sales.

An important stage of the post-webinar process is making sure that the right information is delivered to sales and the performance of the webinar is evaluated. Sharing data throughout the organization is not enough though, you need to ensure that the right data reaches the right teams, and insights are acted upon.

Over half of respondents (52 percent) claim they share quality leads with sales, and also use webinar data to evaluate the content and program performance. The vast majority (86 percent) of those offering training programs collect feedback data from participants.

Just over half of respondents (53 percent) say it's 'extremely important' to have access to engagement insights, while two in five (41 percent) say it's 'moderately important'.

ON24 TIP

USE WEBINAR DATA TO CLOSE THE LOOP AND IMPROVE PERFORMANCE.

Make sure to collect and use data from your webinars to find out what works well—and what doesn't. Also look to integrate your webinar platform with your CRM, marketing automation or eLearning systems—this will help those not directly involved with webinars to be able to see how each one of your customers interacts and engages.

WEBINARS IN THE MARKETING AND SALES CYCLE

74%

say they can tie marketing activity to revenue.

Our research shows that the role of webinars in driving engagement and increasing the pipeline is widely acknowledged, as the vast majority of respondents (95 percent) agree that webinars represent a key part of their marketing efforts. Over a third (38 percent) consider webinars to be 'critical' to their digital communications, with an additional 35 percent seeing them as 'somewhat important'. On average, respondents rate the importance of webinars to their digital communications as 3.08 on a five-point scale. Webinars are an easy tool at marketers' disposal, with eight in ten respondents agreeing they are 'easy to create'.

Two-thirds of those surveyed (65 percent) provide up to five marketing touches per webinar experience. At the other end of the spectrum, only 12 percent provide more than ten marketing touches.

An overwhelming majority of respondents (95 percent) use webinars to generate leads and around three-quarters (76 percent) say that webinars enable them to reach more leads. Half of those surveyed consider the quality of leads generated through their webinars to be above average (4 or 5 on a five-point scale). On average, respondents rate the quality of leads generated through their webinars as 3.52 on a five-point
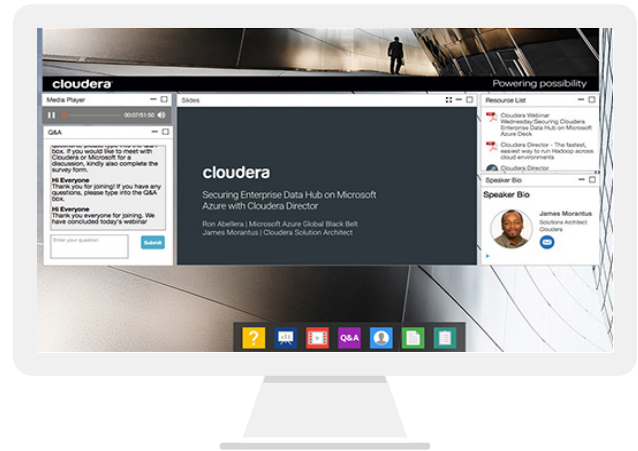
scale. Additionally, webinars are considered to be cost effective, with eight in ten (80 percent) respondents claiming they help lower their cost-per-lead.

While webinars are indeed an important top-of-funnel, lead generation tool, their benefits extend far beyond that. Capturing the attention of your target audience on a large scale, all the while positioning you as an authority and fueling your marketing programs, is what sets webinars apart. Scale is a benefit that is commonly mentioned, as the majority of respondents claim that webinars help extend their brand (75 percent) or scale their marketing efforts (69 percent).

Just under half of those surveyed (49 percent) say that webinars enable them to reach targeted accounts. Identifying and targeting key accounts has always been a best practice, and webinars are best placed to support account-based marketing programs as they help drive engagement with high-yield accounts.

Benefits of webinars reported by respondents:

76%
Reach more leads

75%
Extend brand

69%
Scale marketing efforts

58%
Look more professional

49%
Reach targeted accounts

ON24 TIP

MEASURE YOUR MARKETING WEBINARS BEYOND NUMBERS OF LEADS.

Define what engagement means for your organization, as this will help you identify the goals you need to measure progress against over time. Always keep track of conversion rates but don't forget about looking at drop-off points and attendee feedback.

PRE-WEBINAR BENCHMARKS

PROMOTIONAL CYCLE

76%
of marketers say webinars allow them to drive more leads.

Webinars are a highly effective way of building an audience and reaching it at scale. The content of your webinar is a key element, but so is the way you promote it. Getting people to be aware, if not excited, about your webinar, should be a concerted effort that starts at least two weeks before launch, or even earlier.

The majority of registrants (54 percent) sign up for a webinar at least eight days before the event. Early registrants, who enroll at least 15 days before the event, account for 28 percent of our sample—a four-point increase over 2017.

Less than half of registrants (46 percent) register up to one week before. It's worth noting that the proportion of late registrants, i.e. those signing up on the day of the event, has halved since 2017, from 23 percent to 11 percent. This might indicate that organizations now use longer promotional cycles, supported by strong email campaigns.

11%	35%	26%	28%
day of	1-7 days before	8-14 days before	more than 15 days before
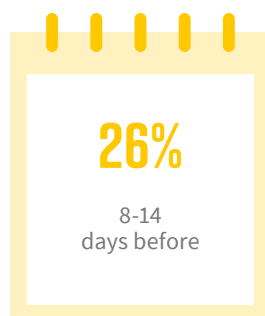
ON24 TIP

### LONGER PROMOTIONAL CAMPAIGNS TRANSLATE TO MORE REGISTRANTS.

Pursuing a longer promotion cycle can boost registration rates and increase the likelihood of converting registrants into attendees. Promotional emails shouldn't just be reminders though. Hit the ground running by including supporting content and building up excitement ahead of your webinar. Read more in our Webinar Registration Best Practices Guide.

BEST DAYS TO SEND PROMOTIONAL EMAILS

65%
say they provide up to five marketing touches per webinar experience.

There's no denying that email is the most effective channel for promoting webinars and driving registrants, so it's an area that requires careful consideration. As shown in previous benchmark reports, mid-week promotional emails perform best. Tuesday, Wednesday and Thursday are the strongest performers, accounting for two-thirds (67 percent) of registrations.

| 16% Monday	22% Tuesday	23% Wednesday
22% Thursday	12% Friday	5% Saturday/Sunday
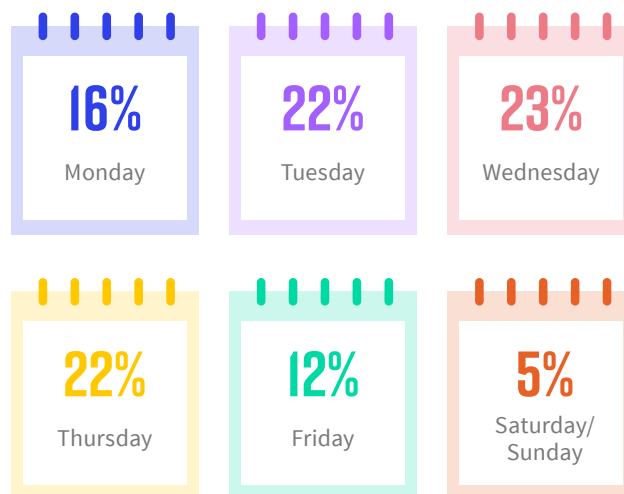
ON24 TIP

AVOID SENDING PROMOTIONAL EMAILS ON MONDAYS AND FRIDAYS.

The middle of the week—Tuesday, Wednesday and Thursday—are the best days for promotional emails. Look at past email marketing metrics to determine the optimal time of day to reach your prospects. More advice is in our eBook on Enhancing Webinar Promotions.

BEST DAYS FOR WEBINAR ATTENDANCE

75% agree that webinars help them to extend their brand reach.

Mid-week is also the best time to hold a webinar, with Wednesday and Thursday again emerging as strong performers. Monday is typically a catch-up day, while Friday is reserved for last-minute emergencies.

10% Monday	24% Tuesday	27% Wednesday
28% Thursday	8% Friday	3% Saturday/Sunday
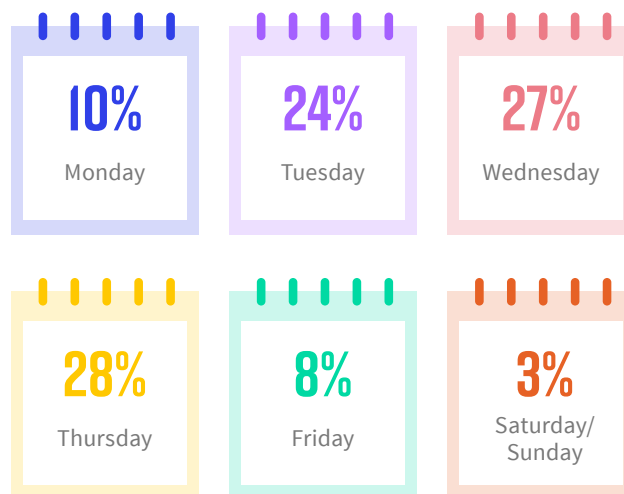
ON24 TIP

### RUN YOUR WEBINARS MID-WEEK. THURSDAY IS THE BEST DAY TO GET LIVE ATTENDEES.

Attendees are most available during the middle of the week. Holding webinars later in the week also allows you to maximize your marketing efforts just before the webinar. Ultimately, if you want to know what will work best for your audience, test different days.

BEST TIME TO RUN WEBINARS

69% say that webinars enable them to scale their marketing efforts.

The best time to run a webinar is 11 a.m. PST (2 p.m. EST) as it avoids most conflicts on both coasts. Other times to consider are 10 a.m. and 12 p.m. PST (1 p.m. and 3 p.m. EST). Remember that the optimal time to run webinars depends on where your audience resides so don't be afraid to experiment.

5% 6 a.m.

6% 7 a.m.

9% 8 a.m.

10% 9 a.m.

13% 10 a.m.

18% 11 a.m.

11% 12 p.m.

5% 1 p.m.
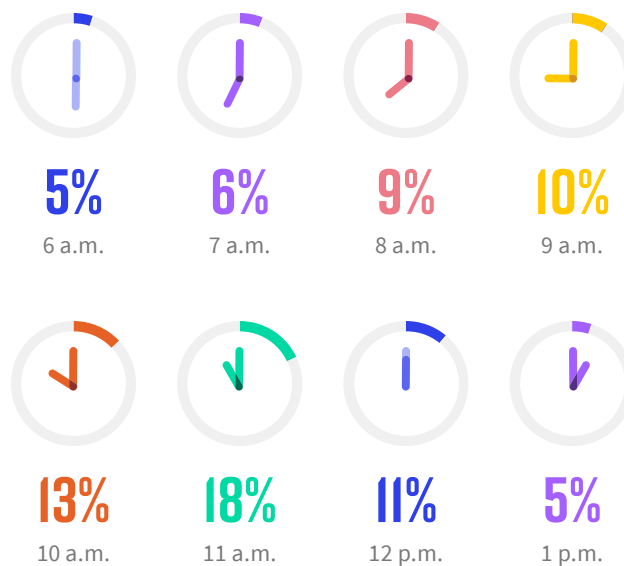
ON24 TIP

RUN YOUR WEBINARS AROUND THE MIDDLE OF THE DAY.

The best time for a webinar is one fitting in with your audience's schedules, but as a rule, lunchtime to early afternoon works well. If in doubt and you're in the US and covering multiple time zones, shoot for 11 a.m. PST (2 p.m. EST).

WEBINAR BENCHMARKS

AVERAGE VIEWING TIME

43% say customizing their webinar console is 'mission-critical'.

The optimal webinar length depends on the topic, content, audience and program's goals. The majority of webinars last for around an hour but can easily exceed that if they cover a particularly complex topic.

In 2018, the average viewing time for webinars, including a ten to 15 minute Q&A session, was 58 minutes, a two-minute increase since the previous report.

For all webinars, the average viewing time is 58 minutes.

Just under three-quarters (72 percent) of survey respondents offering training programs say their individual lessons last about an hour, while 17

percent say they last about half an hour. Typical lesson lengths are similar for those using webinars for continuing education, with the vast majority (88 percent) saying their lessons last between 30 and 60 minutes.

Average viewing time for webinar attendees:

58'	56'	55'	57'
2019	2018	2017	2016

56'	56'	56'
2015	2014	2013

ON24 TIP

MAKE YOUR WEBINARS THE RIGHT LENGTH FOR YOUR AUDIENCE—AND SAVE TIME FOR Q&A.

While there's evidence that attendees don't mind longer webinars, it's important to find the sweet spot for your audience instead of just using an arbitrary number. No matter what the optimal webinar length is for you, make sure you allow enough time for a Q&A session.

REGISTRANT TO ATTENDEE CONVERSION

56%
of registrants convert to attendees on average.

Achieving a high number of registrations is the first step in a successful webinar program, but the attendance rate is one of the key performance indicators you need to look at to gauge its true effectiveness. A 35 to 45 percent conversion rate is typically considered to be good.

In 2018, the average registrant to attendee conversion rate overall was 55.9 percent. For events with more than 100 attendees, the average conversion rate was 43.3 percent. According to our data, training and communications see the highest conversion rates (45 and 67 percent, respectively).

Average webinar conversion rate for webinars with more than 100 attendees:

67.05%
Communications
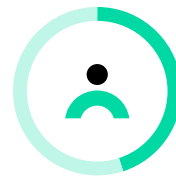
44.79%
Training

39.10%
Marketing

30.79%
Continuing education

ON24 TIP

MONITOR AND IMPROVE YOUR REGISTRATION TO ATTENDEE CONVERSION RATE.

The nature of work means your customers are always-on, so they might not have time to attend live. However, when they do so, you have a unique opportunity to interact.

AVERAGE ATTENDEE RATE

38%

of all webinars in 2018 featured some type of video.

According to our data, a third of all ON24 webinars attract at least 100 attendees.

The attendance rate for webinars with 100 to 199 attendees jumped to 50 percent, a one-point increase since our 2018 report.

Distribution of webinar by size, as a percentage of webinars with more than 100 live attendees:

50%	19%	15%
100-199	200-299	300-499

10%	6%
500-599	1,000+
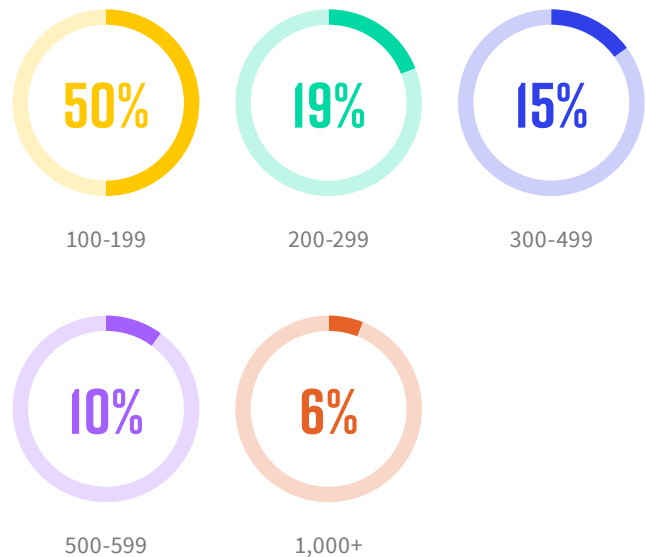
ON24 TIP

USE WEBINARS TO BROADCAST YOUR IN-PERSON EVENTS FOR MAXIMUM REACH.

Reach a larger audience and create a more tailored experience by combining the impact of in-person events with the scale provided by webinars. Whether it is a hybrid event or a fully virtual conference, you can meet the needs of different personas and provide always-on content they can access on their terms. Check out our webinar on How Box Uses Digital to Boost the Impact of In-Person Events.

INTEGRATION OF ENGAGEMENT TOOLS

69% of all webinars in 2018 offered resources for attendees to download or engage with.

Two-way engagement is one of the key benefits of webinars, so encouraging engagement throughout each session is essential.

Encouragingly, seven in ten respondents (69 percent) claim they build webinars with interactivity in mind, such as allowing for breaks for attendees to respond to polls or responding to chat questions. But there's certainly room for improvement, as less than a third say their webinars are 'very' (7 percent) or 'moderately' (24 percent) interactive. On average, respondents rate the interactivity of their webinars as 3.13 on a five-point scale.

Six in ten respondents (61 percent) using webinars for continuing education ensure attendees are paying attention to the course material. Forty-four percent issue polls throughout the course, while a similar proportion (40 percent) require questions through the Q&A widget.

As was the case last year, the questions and answers widget has emerged as the most popular tool to drive audience interaction, used in 81 percent of all webinars. This is not surprising, as 63 percent of respondents say that Q&A widgets typically drive the most engagement.

Resource lists (69 percent) and surveys (36 percent) are the next most frequently used widgets. However, only 13 percent of those surveyed say that resource lists are most likely to drive engagement in their webinars—meaning that they should be complimentary to your session.

Compared to last year's report, surveys, group chat and resource lists have seen increased usage (up by four, three and two percentage points, respectively).
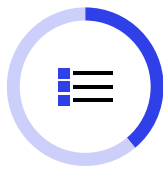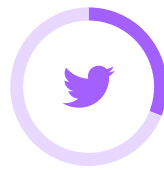
Engagement Tool Utilization:

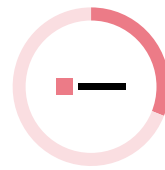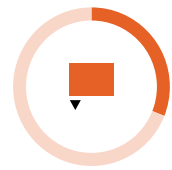| 81%	69%	36%	25%	22%	10%
Q&A	Resources for download	Surveys	Social	Polling	Group chat

ON24 TIP

AUDIENCES LOVE INTERACTIVITY. MAKE SURE YOUR WEBINARS TAKE FULL ADVANTAGE OF IT.

Featuring interactive elements, such as polls, live Q&As, group chat or using social media to extend the discussion beyond the webinar, can pique attendee interest, encourage them to stay tuned in and help you tailor the session to their needs in real time.

INTEGRATION OF VIDEO

51% simply use a webcam to record video—so don't be put off by a perceived need to use expensive cameras or equipment.

Roughly 38 percent of all webinars in 2018 featured some type of video, a remarkable 16-point jump from 2017. This suggests practitioners are becoming increasingly comfortable with the use of video technologies and are acknowledging the importance of incorporating video into webinars. On average, respondents rate the importance of video integration as 7.8 on a ten-point scale.

For ON24 webinars, videos include:

- Studio produced
- Webcam presentations
- Integrated video clips
- Streaming and screen sharing

In the vast majority of cases (82 percent), respondents to our survey said they still rely primarily on audio their go-to way of delivering content. But almost eight in ten respondents (78 percent) who rely on audio also use video, which can be embedded in the session as well as the more obvious method of speaking to camera.

The most popular use case for video is product demos (61 percent), followed by live events (41 percent) and panel discussions (31 percent). Around a fifth of respondents have presenter personalities (20 percent)—such as ON24's own Mark Bornstein—or use short 'commercial breaks' in their webinars (17 percent).

Over half of those surveyed (56 percent) say they use both live and on-demand video. Two-fifths (44 percent) use simulive features, i.e. recording beforehand, but interacting live during the webinar. Less than a third (29 percent) broadcast live.

Out of those who don't use video, around a third claim that they don't need video in their webinars (36 percent) or they don't have the necessary skills for video production (32 percent). Only a quarter (27 percent) say that video production is too expensive for them.

ON24 TIP

### USE VIDEO IN YOUR WEBINARS TO DRIVE ENGAGEMENT.

Video is one of the most effective forms of content you can use to convey your message, and adding video to webinars has been proven to increase audience engagement and viewing times. Turn passive viewing into active engagement by integrating relevant video content into your webinars. For more tips, read our guide on Five Ways to Integrate Video Into Your Webinars.

POST-WEBINAR BENCHMARKS

ALWAYS-ON VIEWING

44% of respondents said they use simulive features—allowing them to record first, but interact live.

While live broadcasts remain the main type of webinar delivery because they encourage real-time engagement, always-on webinars have increased in popularity as registrants can access them when it's most convenient for them. Doing a live webinar and then making the recording available on-demand can offer you the best of both worlds.

59%
Live only

5%
Live and always-on

36%
Always-on only
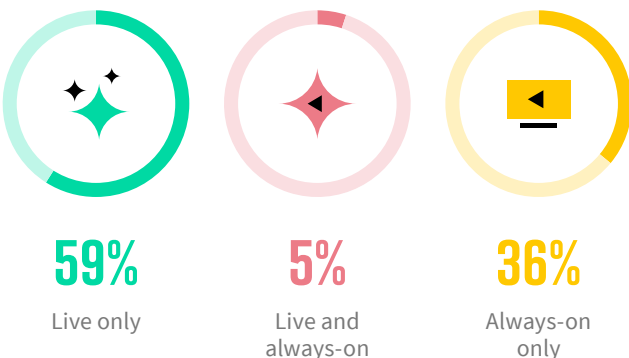
Almost all respondents (98 percent) using webinars for marketing claim their programs are always available for consumption.

Three-quarters (76 percent) of respondents offering training programs offer them both live and on-demand, while 21 percent offer live training only. Two-thirds (67 percent) of those using webinars for continuing education offer their programs both live and on-demand. Out of those only offering educational webinars live, 58 percent do so to adhere to industry regulations, while two in five use live broadcasts to ensure honest participation in a course (25 percent) or audience engagement (17 percent).

Seven in ten video users pre-record their webinars. On average, respondents rate the importance of being able to pre-record video as 8.57 on a ten-point scale, with 36 percent saying that this is a 'mission-critical' feature. This is not surprising when taking into consideration that nine in ten of those surveyed (91 percent) agree that pre-recording video for webinars saves them time and energy.

ON24 TIP

USE SIMULIVE WEBINARS TO REACH THOSE WHO PREFER TO WATCH LIVE.

Pre-recorded webinars can feel as dynamic and interactive as live events if you conduct a live Q&A session at the end of the presentation. You can also extend their shelf life by distributing the same content to different audiences, and adding interactive elements that are the best fit for each audience.

POST-LIVE REGISTRATIONS

## 89% of respondents using video make this content available on-demand.

Thirty-six percent of all attendees only watch always-on webinars, a one-point increase over 2017. Of these always-on attendees, the majority register a week after a live event.

Around three-quarters of respondents (74 percent) use a tool to host always-on webinars. Of those, 59 percent host webinars on a special page on their website and a third (34 percent) use ON24 Gateway. Only 5 percent use video hosting platforms such as YouTube or Vimeo.

Of those who don't make always-on webinars available, two-thirds (67 percent) don't find it useful and 33 percent don't know how. However,

all of these respondents say they're planning to start using always-on webinars within the next 12 months.

Post-live Registrants:
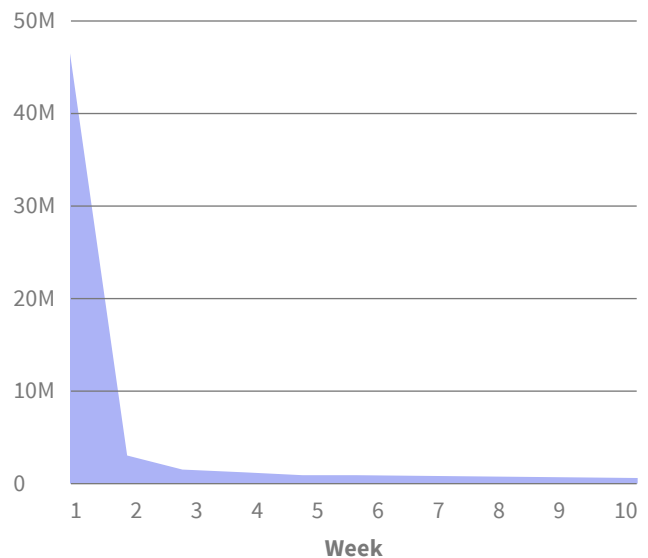
ON24 TIP

## CONSIDER DRIVING POST-LIVE REGISTRATIONS AROUND A WEEK AFTER THE EVENT.

Today's professionals have busy schedules. If they didn't have time to attend live, they might not have time to open an email promoting the always-on session if you send it straight after you've wrapped up the live webinar. To further increase the shelf life of your webinars, read our guide on the Keys to Building an On-Demand Webinar Strategy.

ALWAYS-ON VIEWING TIME

91%
of respondents using video make this content available on-demand.

Always-on viewing times continue to grow year-over-year. This year, the average viewing time has increased from 44 minutes to 47 minutes, reflecting the popularity of always-on content.

47' 2019

44' 2018

42' 2017

34' 2016

29' 2015
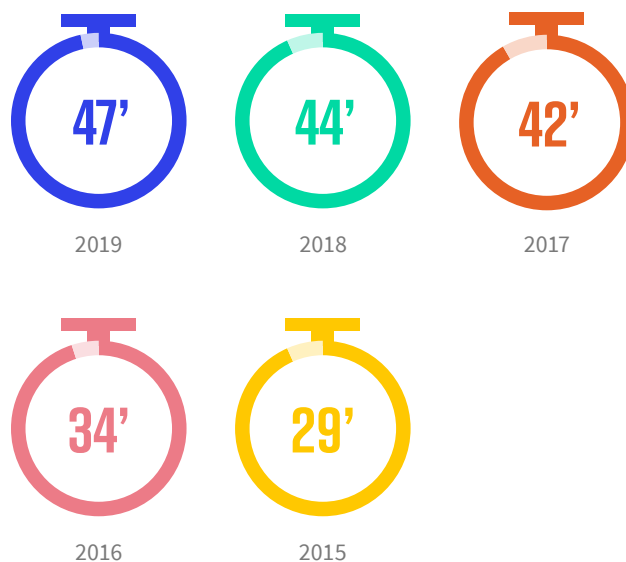
ON24 TIP

MAKE SURE YOUR WEBINARS ARE AVAILABLE AS ALWAYS-ON.

Attendees are accessing more content in an always-on fashion to fit it around their schedules. While keeping content fresh is important, don't remove access to your webinar too soon. Instead, use that time to drive views even after the event is over—and plug other webinars to encourage Netflix-style content bingeing. Read our Webinerd's Guide to Always-On Engagement for more.

CONCLUSION

The data from our report shows that 2018 was indeed an excellent year for webinars. Moving into 2019, we now see more than 40,000 hours of webinar content being watched every day. Someone enters an ON24 webinar approximately every two seconds, and every 11 seconds someone is asking a question.

We've seen not only an increase in webinar volume, but also figures that point to webinars becoming better. There's been a significant increase in the use of video, always-on viewing is up, and technology is providing even more ways to engage.

Engagement scores across marketing, training and internal communications have all seen increases year over year, with the average figures below.

Average ON24 Engagement Score per Channel Type

Marketing: 4.7

Training: 4.7

Continuing Education: 5.1

Internal Communications: 4.4

Our survey data also shows that the worldwide community of Webinerds is brimming with enthusiasm for what webinars can offer, helping them to extend their brand, scale their marketing efforts and look more professional. And even though good webinars do take some work to put together, some 80% say webinars are easy to create.

But it doesn't mean we should stop improving. In an extremely noisy world, only the best ways of communicating will stand out. Webinars should act as both the tip of the spear in breaking through this noise, and as a medium that keeps your conversation going.