zoom

Cisco webex

workplace
from ∞ Meta

Microsoft Teams

Nov '21 - Oct '22 | Advertising Channel Scan™

How Business Communication Platforms Allocated $26M in Digital Ads in 1 Year

Paid Display OTT Facebook

YouTube Twitter Instagram TikTok

The following companies were included in the competitive set for this analysis:
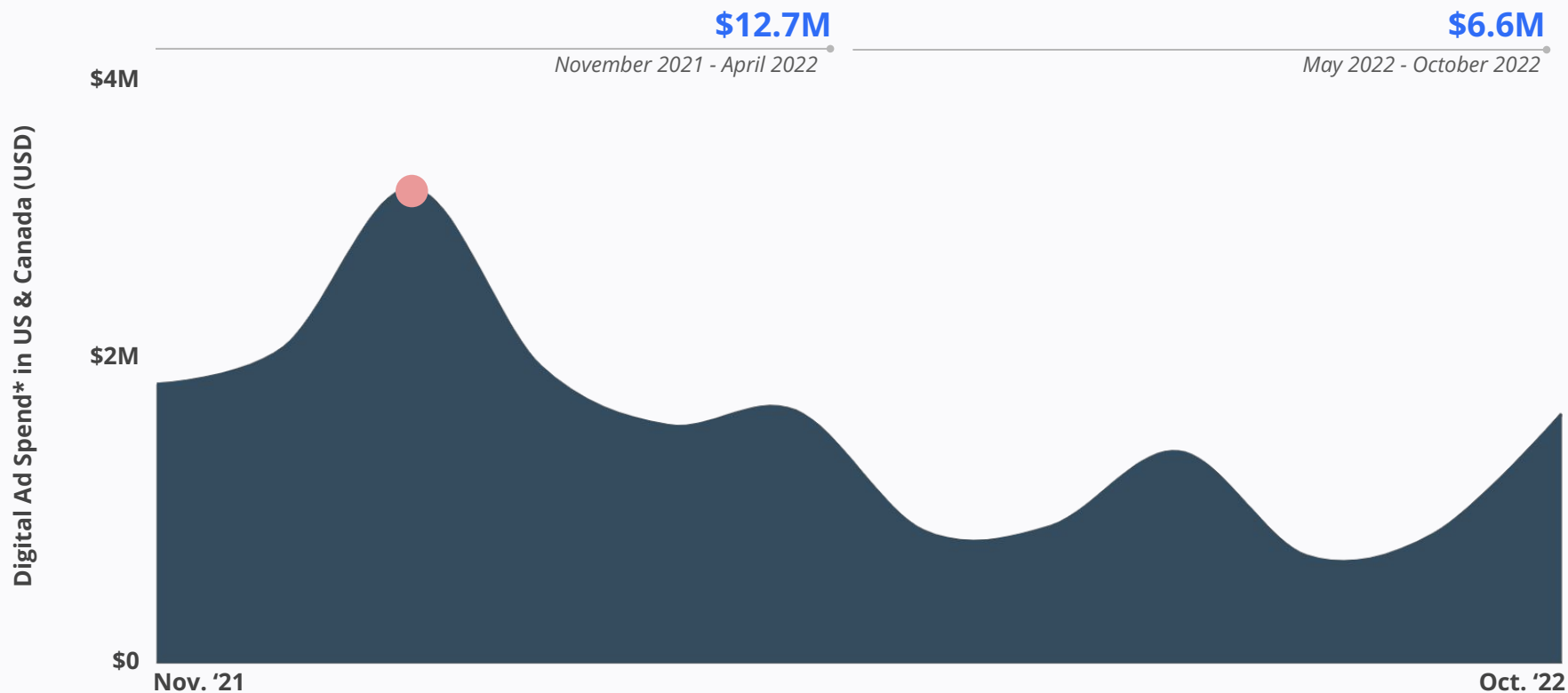
Key Takeaways

Advertising Channel Scan™

Advertising Trends
- Brands in the competitive set spent the most on **Paid Search** ($14.2M), followed by **OTT** ($2.5M) and **Display** ($2.4M). **Snapchat** ($37K) saw the lowest ad spend allocations.
- All brands in the competitive set saw **decreases** in ad spend from the first half to the second half of the time period except for **Meta Workplace** (+50%).
- All channels saw decreases in ad spend from the first half to the second half of the period except for **Display** (+22%) and **Twitter** (+27%). **TikTok** was experimented with for the first time in the second half of the period.
- **62%** of brands saw **Paid Search** advertising on their top 2 rosters for the highest spends.
- **Zoom** had the highest budget amongst the competitive set, with an ad spend of $13.9M from Nov. '21 - Oct. '22.
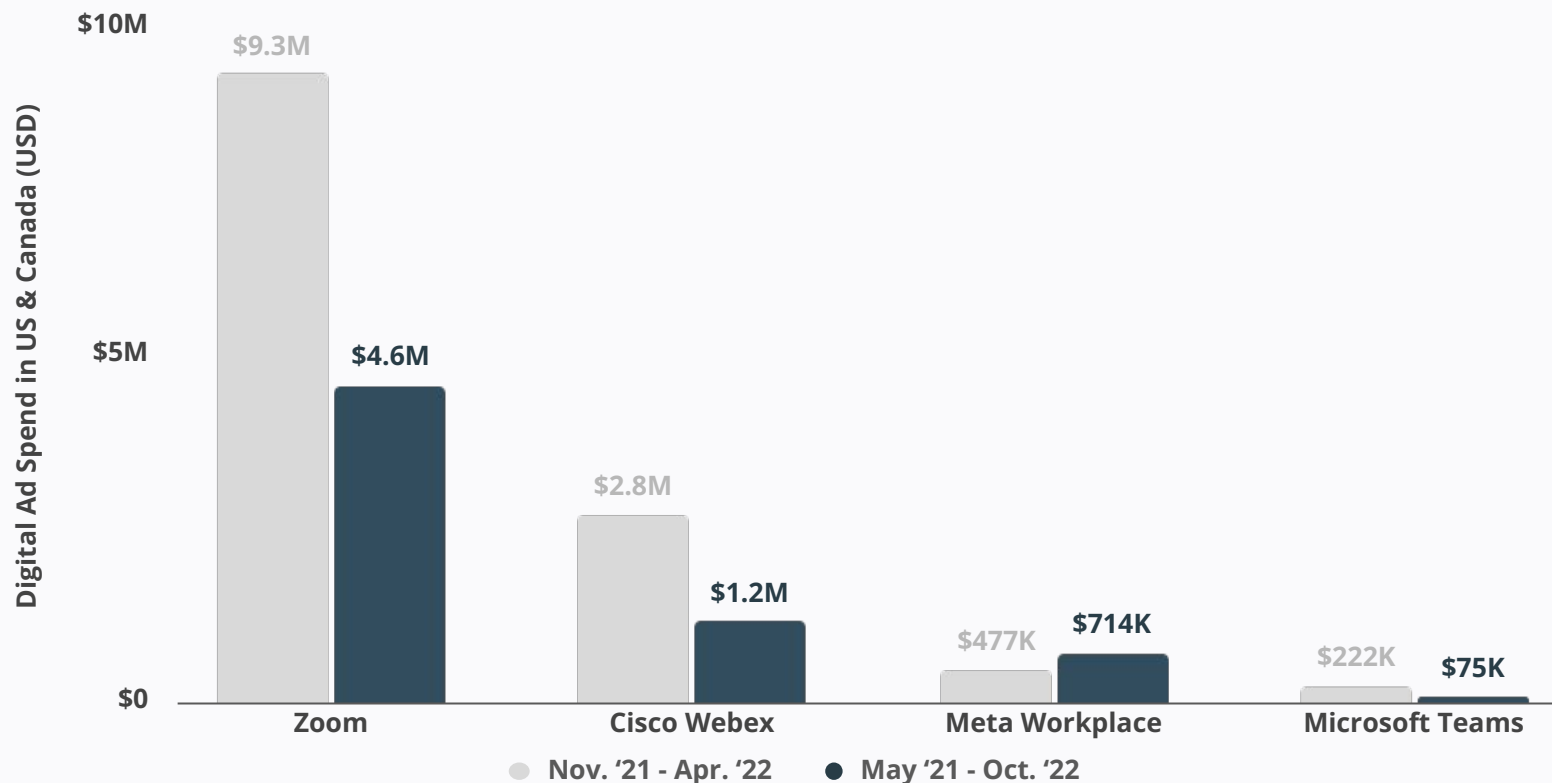
Content Trends
- **Zoom** had ads that focused on **incentivizing** the viewer to click by providing a free sign-up or a 50% discount on its sign-up.
- **Microsoft Teams** ran an Instagram ad advertising that they're now on YouTube. The copy states this YouTube channel shares tips and how-to guides for Microsoft Teams.
- **Microsoft Teams** partnered with Starbucks during the holiday season to help their users easily give a gift to their coworkers using their platform.
- **Cisco Webex** utilizes their client, Formula 1 McLaren team, in their ads to convey to viewers the reliability of their platform and capitalize on the popularity of Formula 1.

From November 2021 to October 2022, the competitive set spent **$19.3M** on digital advertising. **Zooms'** Paid Search and Display spend led to the spike in investment.

$12.7M
November 2021 - April 2022

$6.6M
May 2022 - October 2022

$4M

$2M

Digital Ad Spend* in US & Canada (USD)
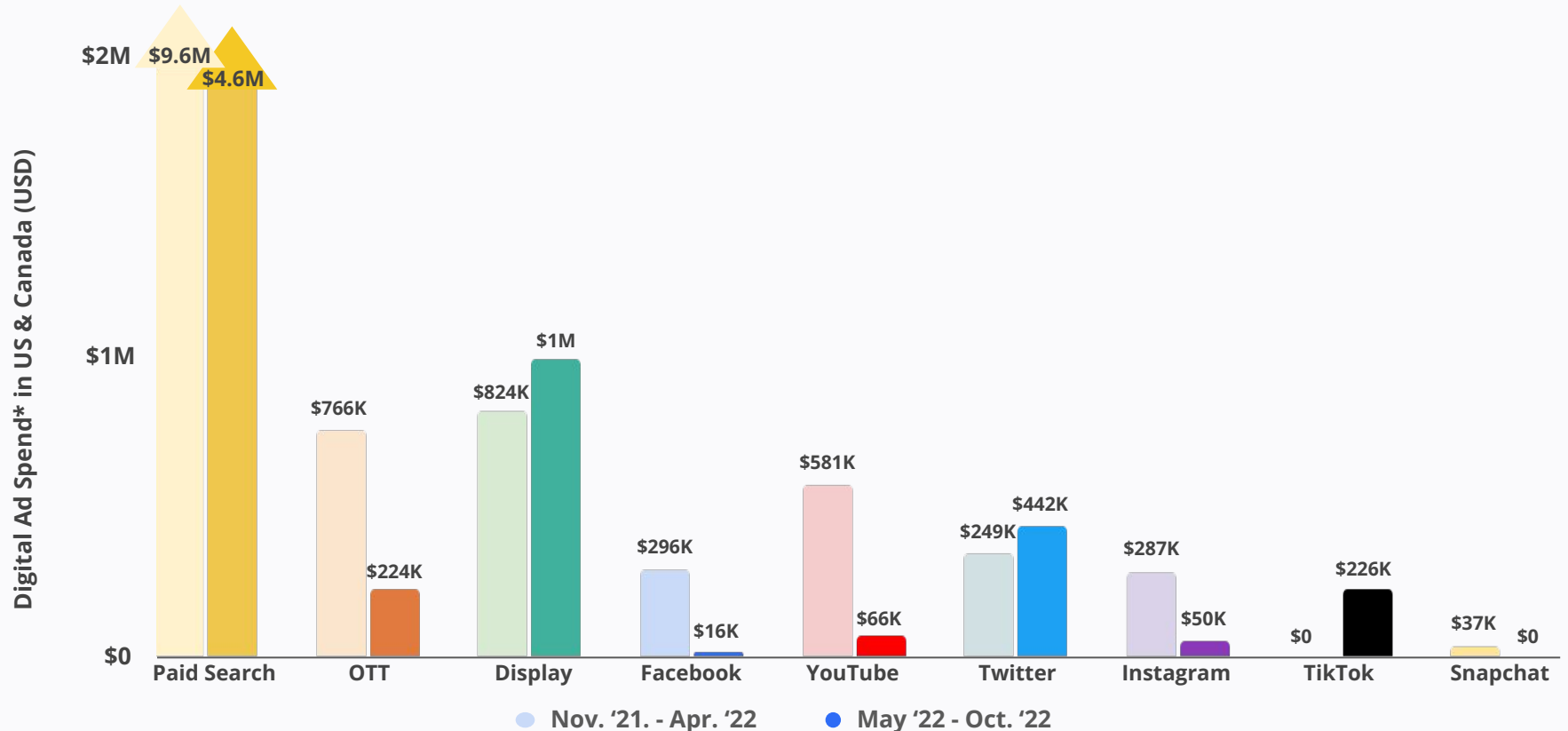
$0

Nov. '21

Oct. '22

*Ad spend includes Paid Search, OTT, Facebook, Display, Instagram, TikTok, YouTube, Twitter, and Snapchat. Data not available for OTT, Instagram, Snapchat, and Twitter in Canada. Spend is a directional approximation and does not include retargeting, or behavioural targeting.

All brands in the competitive set saw decreases in ad spend from the first half to the second half of the time period except for Meta Workplace (**+50%**).

Digital Ad Spend in US & Canada (USD)

$10M

$9.3M

$5M

$4.6M

$2.8M

$1.2M

$477K
$714K

$222K
$75K

$0

Zoom   Cisco Webex   Meta Workplace   Microsoft Teams

⬤ Nov. '21 - Apr. '22   ⬤ May '21 - Oct. '22

Spend is a directional approximation and does not include retargeting, or behavioural targeting. Data not available for OTT, Instagram, Snapchat, and Twitter in Canada. Paid Search not available for Microsoft Team because they do not have a standalone website.

All channels saw decreases in ad spend from the first half to the second half of the period except for Display (**+22%**) and Twitter (**+27%**). **TikTok** was experimented with for the first time in the second half of the period.

Digital Ad Spend* in US & Canada (USD)

	Nov. '21. - Apr. '22	May '22 - Oct. '22
Paid Search	$9.6M	$4.6M
OTT	$766K	$224K
Display	$824K	$1M
Facebook	$296K	$16K
YouTube	$581K	$66K
Twitter	$249K	$442K
Instagram	$287K	$50K
TikTok	$0	$226K
Snapchat	$37K	$0

Y-axis: $2M, $1M, $0

● Nov. '21. - Apr. '22   ● May '22 - Oct. '22

Spend is a directional approximation and does not include retargeting, or behavioural targeting. Data not available for OTT, Instagram, Snapchat, and Twitter in Canada.
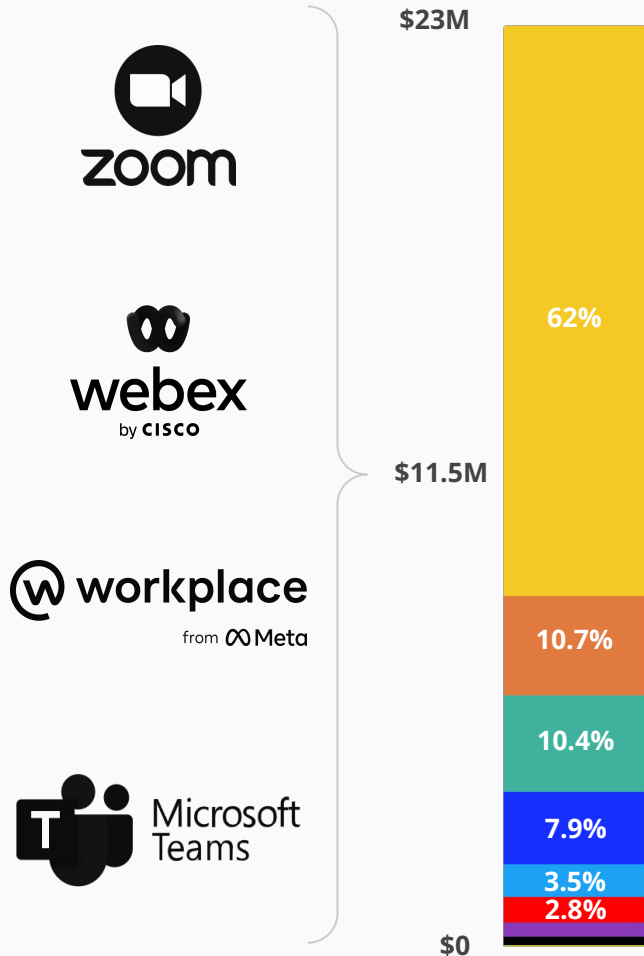
| Channel	Budget
● Paid Search	$14.2M (62%)
● OTT	$2.5M (10.7%)
● Display	$2.4M (10.4%)
● Facebook	$1.8M (7.9%)
● Twitter	$791K (3.5%)
● YouTube	$648K (2.8%)
● Instagram	$337K (1.5%)
● TikTok	$226K (1%)
● Snapchat	$37K (0.2%)

Paid Search (**$14.2M**) saw the highest budget allocation across the competitive set, followed by **OTT** ($2.5M) and **Display** ($2.4M).

TikTok ($226K) and **Snapchat** ($37K) saw the lowest ad spend allocations from November 2021 to October 2022.

Spend is a directional approximation and does not include retargeting, or behavioural targeting. Digital Ad Spend in US & Canada (USD). Data not available for OTT, Instagram, Snapchat, and Twitter in Canada. Paid Search not available for Microsoft Team because they do not have a standalone website.

## Share of Ad Spend by Country
November 2021 - October 2022

87%

13%
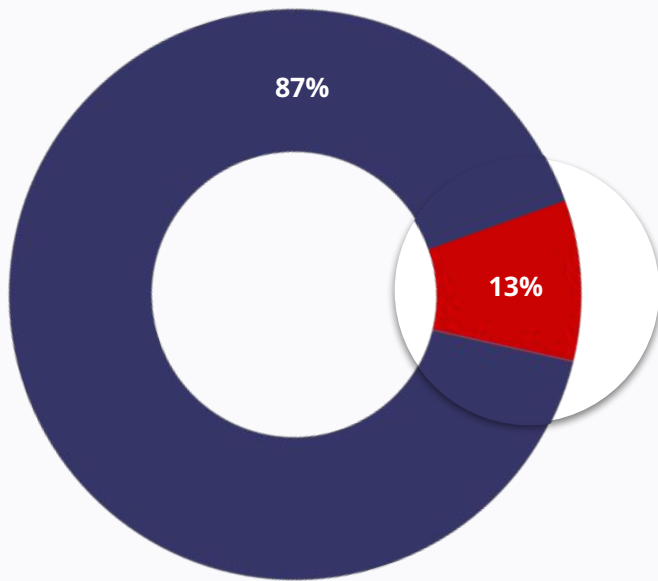
● **United States** ● **Canada**

From November 2021 to October 2022, the **United States** saw the highest budget allocation across the competitive set at **$17.2M**.

Ad spend in **Canada** represented 13% of the budget at **$2.6M**.

All brands in the competitive set had a budget allocation of **less than 15%** toward Canada.

Spend is a directional approximation and does not include retargeting, or behavioural targeting.
Digital Ad Spend in US & Canada (USD). Data not available for OTT, Instagram, Snapchat, and Twitter in Canada.
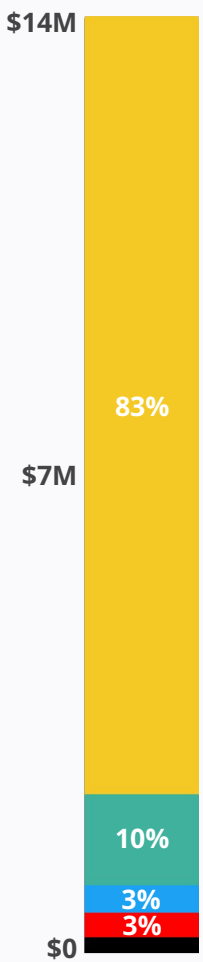
| Channel	Budget
🟡 Paid Search	$11.5M (83%)
🟢 Display	$1.3M (10%)
🔵 Twitter	$400K (3%)
🔴 YouTube	$376K (3%)
⚫ TikTok	$226K (2%)
🔵 Facebook	$5K (0.04%)
🟠 OTT	$5K (0.03%)

$14M
$7M
$0

83%
10%
3%
3%

From November 2021 to October 2022, **Zoom** spent **$13.9M** on digital advertising.

83% of their budget went towards **Paid Search** (**$11.5M**), followed by **Display** at **$1.3M**.

Spend is a directional approximation and does not include retargeting, or behavioural targeting.
Digital Ad Spend in US & Canada (USD)
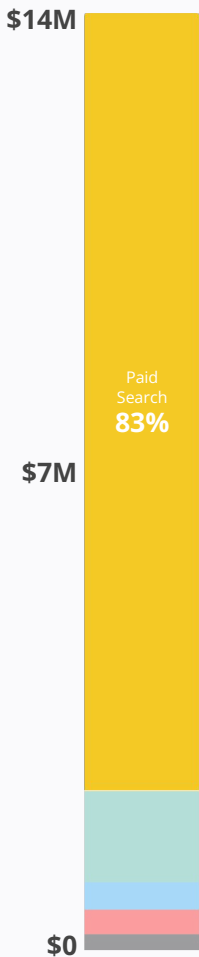Data not available for Twitter, TikTok, and OTT in Canada.

Share of Ad Spend by Device
November 2021 - October 2022

$14M

Paid
Search
83%

$7M

$0

15%

85%
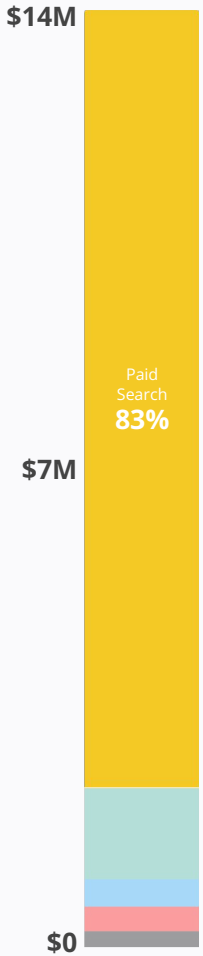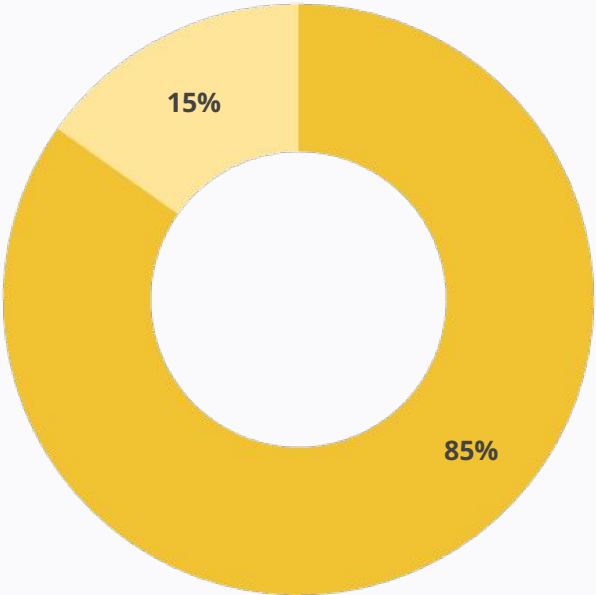
● **Desktop**   ● **Mobile**

Zoom budgeted **$9.8M** toward **Desktop** Paid Search (85%) compared to **$1.7M** on **Mobile** Paid Search (15%).

Spend is a directional approximation and does not include retargeting, or behavioural targeting.
Digital Ad Spend in US & Canada (USD)

Paid Search Tactics
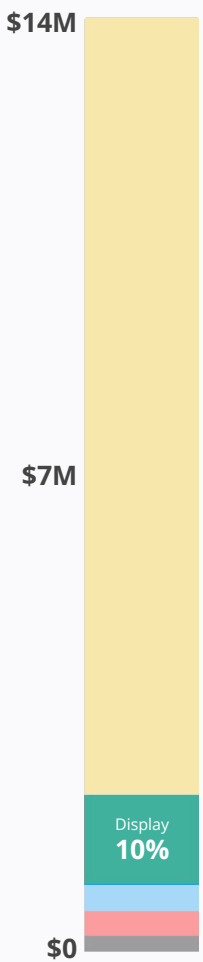
$14M ┐

$7M ┤

Paid Search 83%

$0 ┘

Zoom spent **$11.5M** on **Paid Search** from November 2021 to October 2022. January 2022 saw the highest ad spend of **$2.2M***.

Catchy Tagline:
- Both ads from Zoom featured the memorable tagline "start zooming today".

Free Sign Ups:
- Zoom's ads both feature call-to-actions like "request a demo" and "sign up free today" to incentivize customers to click on their ad.

Simplified Screen Sharing | Start Zooming Today
Ad https://explore.zoom.us/

Simplify Video Conferencing and Screen Sharing Across Any Device. Sign Up Free Today! Zoom Connects to Your Favorite Applications to Improve Collaboration. Request a Demo!

Spend: **$145K** | Traffic: **6.6K** | CPC: **$22**
View landing page

Start Zooming Today | The Best Meeting Experience
Ad https://www.zoom.us/

Zoom Connects to Your Favorite Applications to Improve Collaboration. Request a Demo! Simplify Video Conferencing and Messaging Across Any Device. Sign Up Free Today! Mobile Screen Sharing. Easy To Use. Unbeatable Price. Video Collaboration. HD Screen Sharing.

Spend: **$74K** | Traffic: **26K** | CPC: **$2.85**
View landing page

Share of Ad Spend by Device
November 2021 - October 2022

$14M

$7M

Display
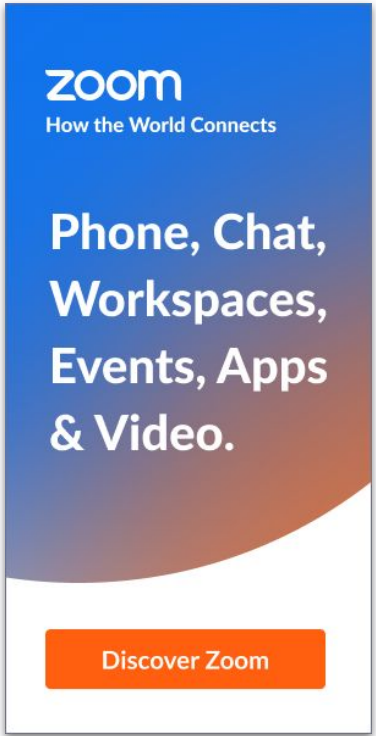**10%**

$0

● **Desktop**   ● **Mobile**

28%

72%

Zoom budgeted **$964K** toward **Desktop** Display ads (72%) compared to **$376K** on **Mobile** Paid Search (28%).

Spend is a directional approximation and does not include retargeting, or behavioural targeting.
Digital Ad Spend in US & Canada (USD)

Display Tactics

Zoom spent **$1.3M** on **Display** ads from November 2021 to October 2022.

Utilizing Buttons:
- Both top display ads from Zoom utilized an eye-catching bright orange button against a white background to incentivize people to click on the ad.
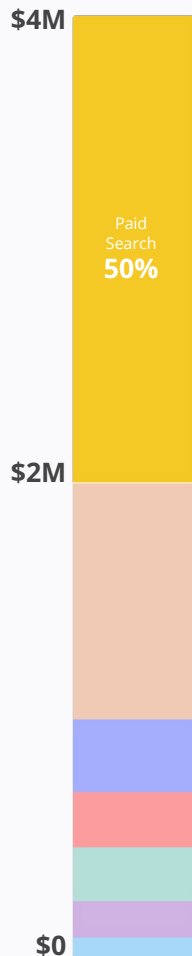
Keeping It Minimal:
- Both display ads are minimal in design and contain a limited amount of text. Maintaining a simple design can allow for quicker comprehension.
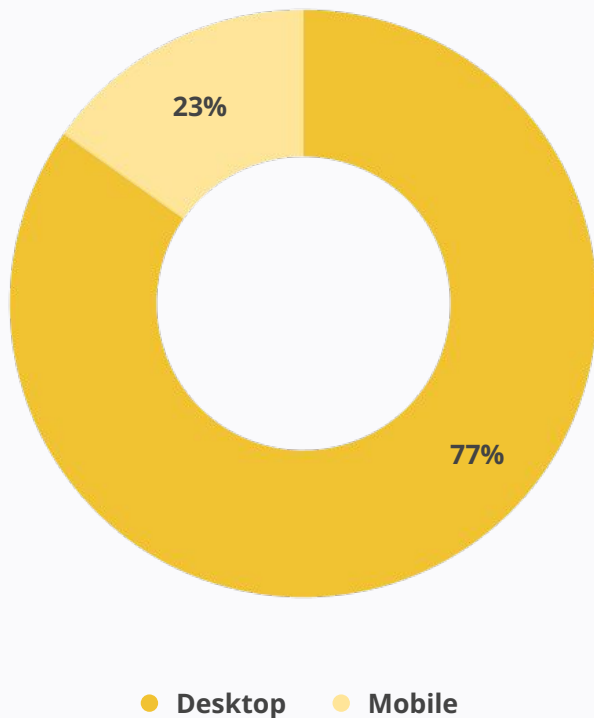
Spend: **$132K** |Imp.: **3.6M**
CPM: **$36** | Click to View

Spend: **$62.5K** |Imp.: **1.6M**
CPM: **$39** | Click to View

$14M

$7M

Display
10%

$0

13

Channel	Budget
● Paid Search	$2M (50%)
● OTT	$985K (25%)
● Facebook	$307K (8%)
● YouTube	$233K (6%)
● Display	$226K (6%)
● Instagram	$148K (3.5%)
● Twitter	$83K (1.5%)

Bar chart values: $4M, 50%, $2M, 25%, 8%, 6%, 6%, 3.5%, $0

From November 2021 to October 2022, **Cisco Webex** spent **$3.9M** on digital advertising.

50% of their budget went towards **Paid Search** (**$2M**), followed by **OTT** at **$985K** (25%).

Spend is a directional approximation and does not include retargeting, or behavioural targeting.
Digital Ad Spend in US & Canada (USD)
Data not available for OTT, Instagram, and Twitter in Canada.

Share of Ad Spend by Device
November 2021 - October 2022

$4M

Paid
Search
50%

$2M

$0

● **Desktop**   ● **Mobile**

23%

77%

Cisco Webex budgeted **$1.5M** toward **Desktop** Paid Search (77%) compared to **$455K** on **Mobile** Paid Search (23%).

Spend is a directional approximation and does not include retargeting, or behavioural targeting.
Digital Ad Spend in US & Canada (USD)

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Paid Search Tactics

Cisco Webex spent **$1.97M** on **Paid Search** from November 2021 to October 2022. May 2022 saw the highest ad spend of **$413K***.
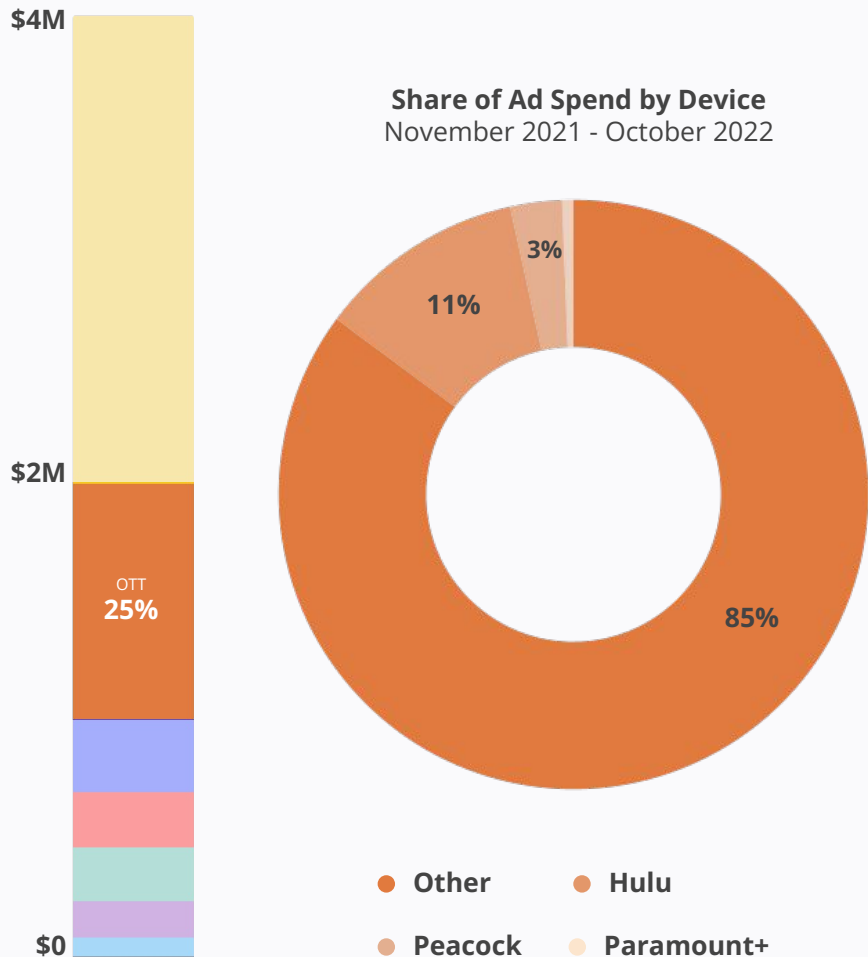
Answering Concerns:

- Both ads from Cisco Webex answer the concerns of company executives looking for a new platform with phrases like "seamless integration", "security & privacy", and "more effectively".

One Size Fits All:

- Cisco Webex ensures that the viewer knows that their platform can support companies of any size through phrases like "scalable for large teams" and "teams of any size".

$4M

Paid Search **50%**

$2M

$0

Webex.com - Webex™ | Meet & Call - Meet & Call in One Platform |
Ad https://www.webex.com
A proven solution for teams of any size to collaborate more effectively. Seamless integration with hundreds of industry-leading apps. Security & Privacy. Meet, Message & Call. Scalable For Large Teams. Enterprise Collaboration.

Spend: **$31K** | Traffic: **14.1K** | CPC: **$2.2**
View landing page

Video Conferencing - The Best in Collaboration - webex.com |
Ad https://www.webex.com
Seamless integration with hundreds of industry-leading apps. Solving hybrid work with smarter video conferencing. Security & Privacy. Enterprise Collaboration. Scalable For Large Teams. Meet, Message & Call.

Spend: **$16K** | Traffic: **11.5K** | CPC: **$1.39**
View landing page

Share of Ad Spend by Device
November 2021 - October 2022

- $4M
- $2M
- $0
- OTT **25%**

85%

11%

3%

- ● **Other**
- ● **Hulu**
- ● **Peacock**
- ● **Paramount+**

Cisco Webex budgeted **$839K** toward **Other*** OTT (85%) compared to **$112K** on **Hulu** OTT (11%).

*Other OTT includes spend from streaming services other than Hulu, Pluto TV, Peacock, Tubi, and Paramount +.
Spend is a directional approximation and does not include retargeting, or behavioural targeting.
Digital Ad Spend in US (USD). Data not available for Canada.

Spend: **$428K** | Imp.: **16.7M**
CPM: **$25.6**
Landing Page not available
Click to View

Spend: **$245K** |Imp.: **9.7M**
CPM: **$25.3**
Landing Page not available
Click to View

OTT Tactics

Cisco Webex spent **$985K** on **OTT** from November 2021 to October 2022. January 2022 saw the highest ad spend of **$231K**.

Sports Team Partnerships:
- In the top ad, Cisco Webex features their partnership with Formula 1 team, McLaren, to leverage Formula 1's popularity and showcase how McLaren trusts and relies on Cisco Webex.

Work from Anywhere:
- In this ad, Cisco Webex uses multiple working scenarios to showcase the variety of places one can use it's platform.
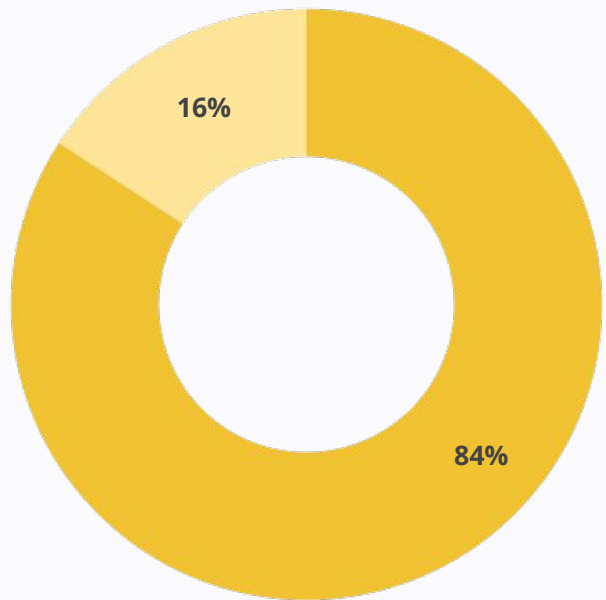
OTT
25%

$4M
$2M
$0

Spend is a directional approximation and does not include retargeting, or behavioural targeting. Digital Ad Spend in US (USD). Data not available for Canada.

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Channel	Budget
● Paid Search	$665K (55%)
● Twitter	$308K (26%)
● Display	$190K (16%)
● YouTube	$39K (3%)

$1.2M
55%
$600K
26%
16%
$0 3%

From November 2021 to October 2022, **Meta Workplace** spent **$1.2M** on digital advertising.

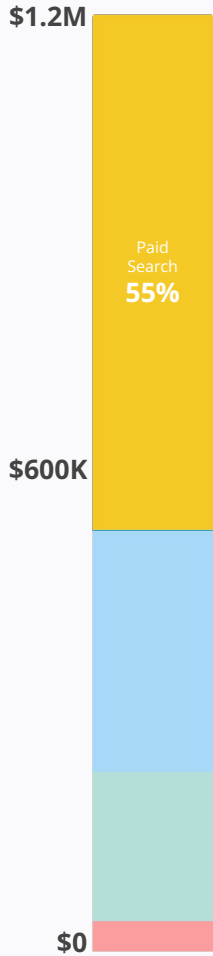55% of their budget went towards **Paid Search** (**$665K**), followed by **Twitter** at **$308K** (26%).

Spend is a directional approximation and does not include retargeting, or behavioural targeting.
Digital Ad Spend in US & Canada (USD)
Data not available for Twitter in Canada.

Share of Ad Spend by Device
November 2021 - October 2022

$1.2M

Paid
Search
55%

$600K

$0

● **Desktop**   ● **Mobile**

16%

84%
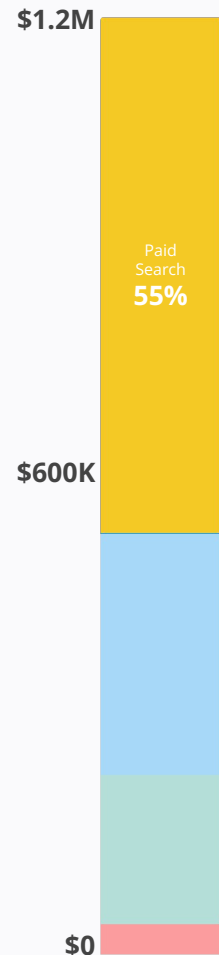
Meta Workplace budgeted **$552K** toward **Desktop** Paid Search (84%) compared to **$104K** on **Mobile** Paid Search (16%).

Spend is a directional approximation and does not include retargeting, or behavioural targeting.
Digital Ad Spend in US & Canada (USD).

20

$1.2M

$600K

$0

Paid
Search
55%

Workplace from Meta - Sign Up to Workplace Today |

[Ad] https://www.workplace.com/work

From video calls to virtual events, keep remote workers connected on Workplace. Try it now. Give frontline workers a voice to be part of the company conversation. Try Workplace today. Familiar and Secure. All-in-one solution. Favourite Integrations. Mobile first. Easy to Use.

Spend: **$37.7K** | Traffic: **2.3K** | CPC: **$16.4**
View landing page

Workplace from Meta - Makes Your Company a Community |

[Ad] https://www.workplace.com/work

Give deskless workers a voice to be part of the company conversation. Try Workplace today. Bring Your Entire Company Together on a Single Platform. Try Workplace from Meta today. All-in-one solution. Familiar and Secure. Mobile first. Easy to Use. Two-way Communication.

Spend: **$37.7K** | Traffic: **2.3K** | CPC: **$16.4**
View landing page

Paid Search Tactics

Meta Workplace spent **$665K*** on **Paid Search** from November 2021 to October 2022. September 2022 saw the highest ad spend of **$350K***.

Focus on Community:
- Both ads focus on community connection messaging with phrases like "give…workers a voice to be part of the company conversation".
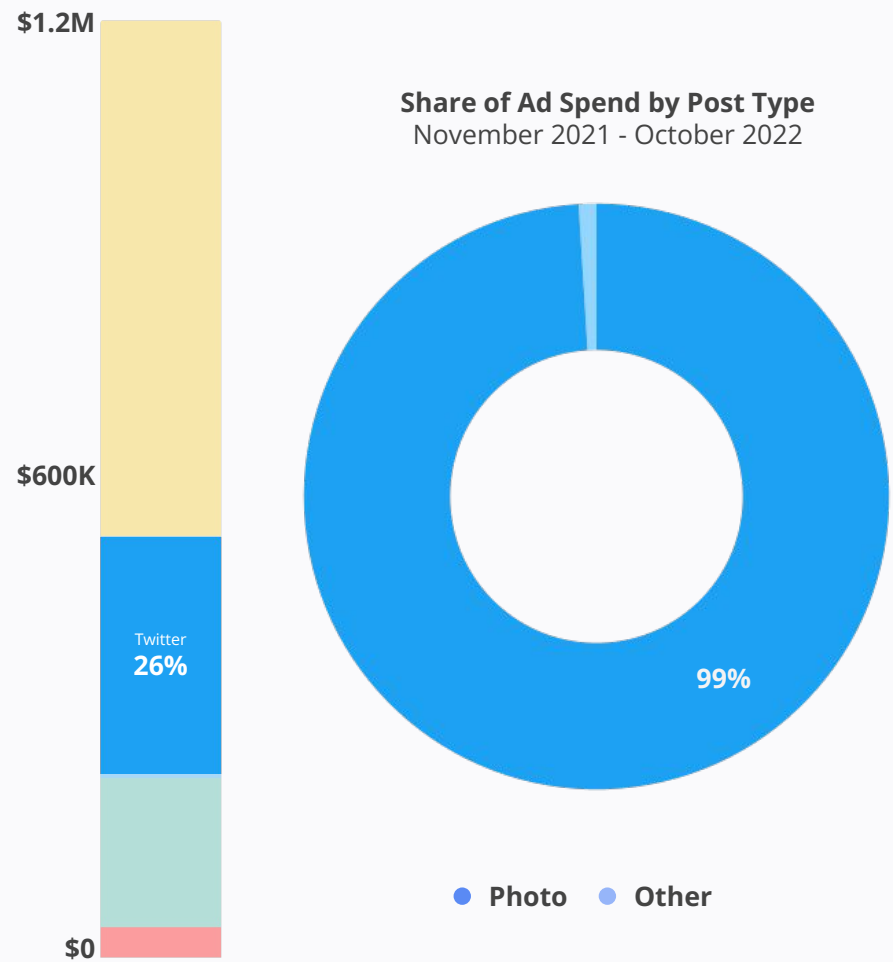
Create Urgency:
- Meta Workplaces creates a sense of urgency in their paid search ads by using the words "today" or "now" in their call-to-actions.

Mobile First:
- Meta Workplace highlights their focus on being "mobile first" in their ads.

Spend is a directional approximation and does not include retargeting, or behavioural targeting. Digital Ad Spend in US & Canada (USD)
*Meta Workplace had zero paid search spend for 7/12 months in the analysis. *Ads shown from September 2022.

Share of Ad Spend by Post Type
November 2021 - October 2022

$1.2M

$600K

Twitter
26%

$0

99%

● **Photo** ● **Other**

On **Twitter**, Meta Workplace budgeted **$305K** toward **Photo** ads (99%).

© RightMetric

Spend is a directional approximation and does not include retargeting, or behavioural targeting.
Digital Ad Spend in US (USD). Twitter data not available in Canada.

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Twitter Tactics

Meta Workplace spent **$308K** on **Facebook** from November 2021 to October 2022. November 2021 saw the highest ad spend of **$239K***.
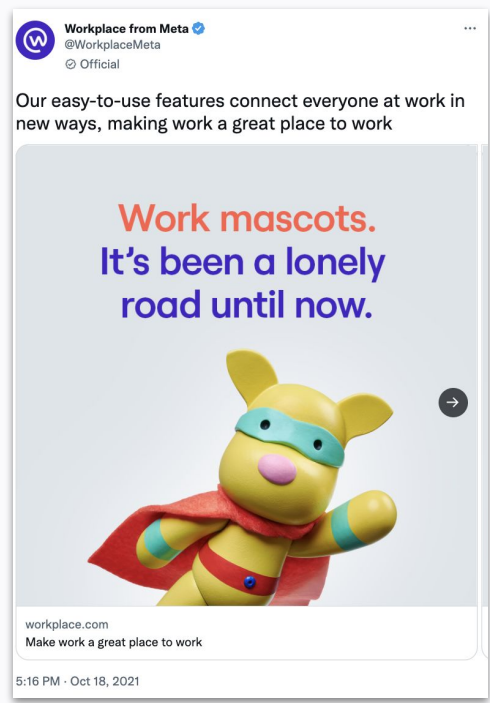
Signature Colors:
- Meta Workplace utilizes it's signature brand colours of purple and gray in every single one of their photos.
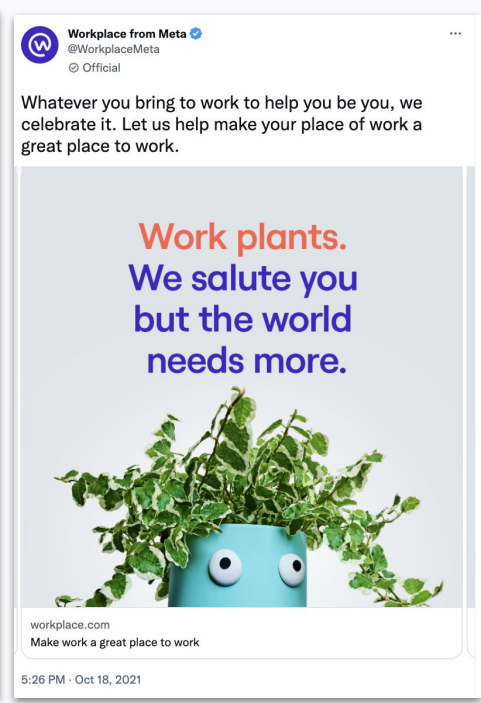
Carousel Photos:
- Both ads contain a carousel of photos that match the same theme.

Animated Objects:
- Meta Workplace brings an element of fun into their ad by using animated objects such as a plant or slippers with eyes.

$1.2M

$600K

Twitter **26%**

$0

Workplace from Meta ✓
@WorkplaceMeta
○ Official

Our easy-to-use features connect everyone at work in new ways, making work a great place to work

Work mascots.
It's been a lonely road until now.

workplace.com
Make work a great place to work

5:16 PM · Oct 18, 2021

Spend: **$105K** |Imp.: **14.5M**
CPM: **$7.2** | Click to View

Workplace from Meta ✓
@WorkplaceMeta
○ Official

Whatever you bring to work to help you be you, we celebrate it. Let us help make your place of work a great place to work.

Work plants.
We salute you but the world needs more.

workplace.com
Make work a great place to work

5:26 PM · Oct 18, 2021

Spend: **$85K** |Imp.: **11.7M**
CPM: **$7.2**| Click to View
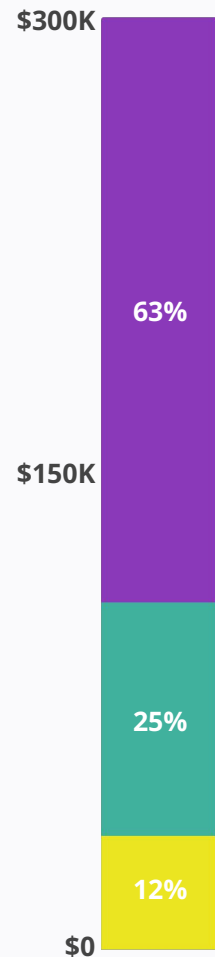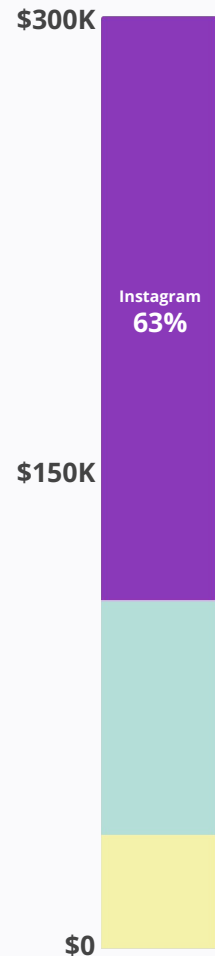
Spend is a directional approximation and does not include retargeting, or behavioural targeting. Digital Ad Spend in US (USD). Twitter data not available in Canada. *Ads shown from November 2021.
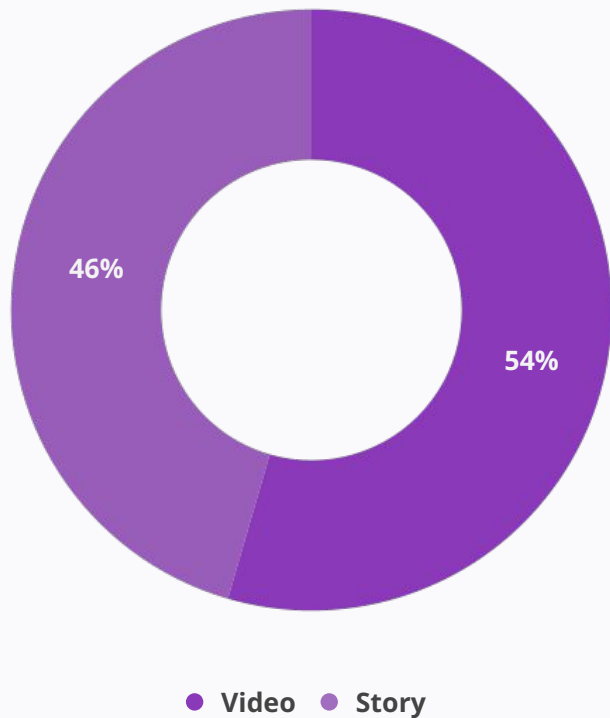
$300K

63%

$150K

$0

Channel	Budget
● Instagram	$189K (63%)
● Display	$75K (25%)
● Snapchat	$37K (12%)

25%

12%

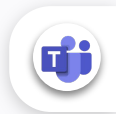From November 2021 to October 2022, **Microsoft Teams** spent **$301K** in digital advertising.

63% of their budget went towards **Instagram** (**$189K**), followed by **Display** ads at **$75K** (25%).

Spend is a directional approximation and does not include retargeting, or behavioural targeting.
Digital Ad Spend in US & Canada (USD). Data not available for Instagram and Snapchat in Canada.
Paid Search not available for Microsoft Team because they do not have a standalone website.

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Share of Ad Spend by Post Type
November 2021 - October 2022

Instagram
63%

$300K

$150K

$0

46%

54%

● **Video** ● **Story**

On **Instagram**, Microsoft Teams budgeted **$103K** toward **Video Post** ads (54%) followed by **Story Post** ads at **$86K** (46%).
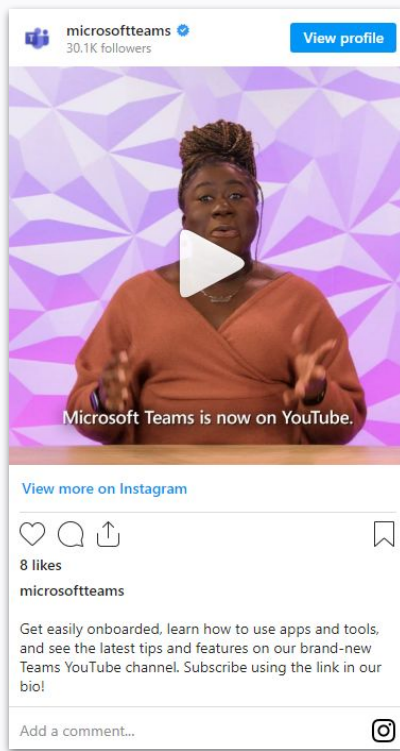
Spend is a directional approximation and does not include retargeting, or behavioural targeting. Digital Ad Spend in US (USD). Data not available for Instagram in Canada.

$300K

$150K

Instagram
63%

$0

Spend: **$27K** |Imp.: **2.8M**
CPM: **$9.64** | Click to View

Spend: **$14K** |Imp.: **1.9M**
CPM: **$7.37** | Click to View

Instagram Tactics

Microsoft Teams spent **$189K** on **Instagram** from November 2021 to October 2022.
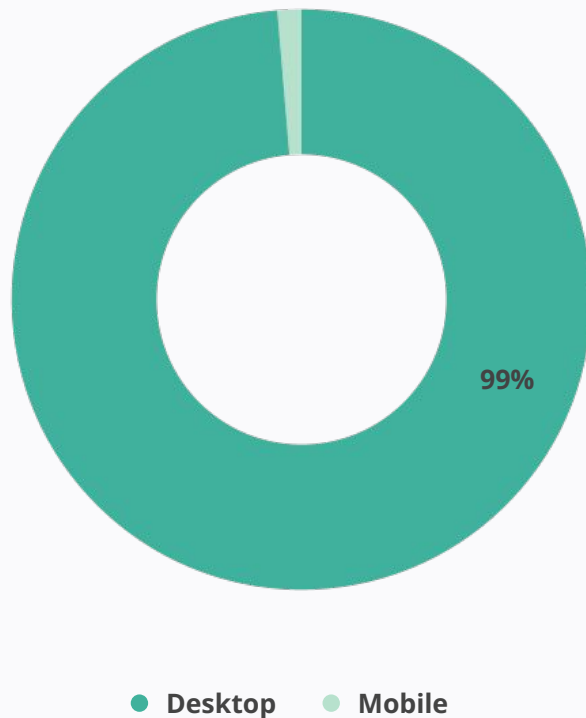
Festive Partnerships:

- Microsoft Teams partnered with Starbucks to help employees easily give a gift to their coworkers during the holiday season.
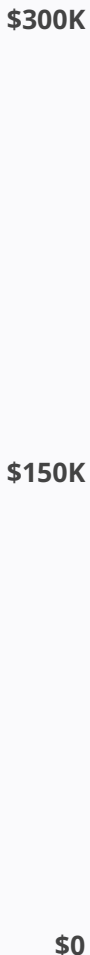
From Instagram to YouTube:

- Microsoft Teams ran an Instagram ad advertising that they're now on YouTube. The copy states this YouTube channel shares tips and how-to guides for Microsoft Teams.
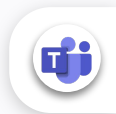
Spend is a directional approximation and does not include retargeting, or behavioural targeting. Digital Ad Spend in US (USD). Data not available for Instagram in Canada.

Share of Ad Spend by Post Type
November 2021 - October 2022

$300K

$150K

Display
25%

$0

99%

● **Desktop**   ● **Mobile**

Microsoft Teams allocated the majority of their Display ad budget towards **Desktop** (99%).

Spend is a directional approximation and does not include retargeting, or behavioural targeting.
Digital Ad Spend in US & Canada (USD).

Display Tactics

Microsoft Teams spent **$75K** on **Display** ads from November 2021 to October 2022. May 2022 saw the highest ad spend of **$9.1K**.

Case Study Backed:
- Microsoft Teams utilizes business case studies to back up their claims on how their platform can help a company save time and money.

Optimized Landing Page:
- Both ads lead to a landing page that is broken down into 3 parts:
  - 1.) Case studies of small businesses using Teams.
  - 2.) Benefits of using Teams.
  - 3.) Plan cost breakdown.
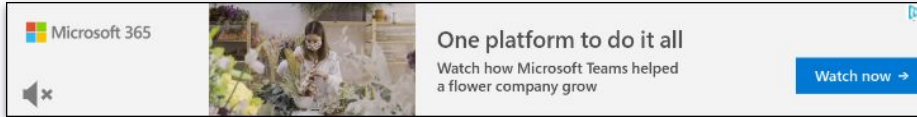
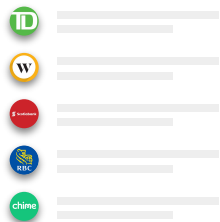Spend: **$7.7K** | Traffic: **2.3M** | CPM: **$3.34**
View landing page

Spend: **$6K** | Traffic: **1.67M** | CPM: **$3.59**
View landing page

$300K

$150K

Display
25%

$0

Spend is a directional approximation and does not include retargeting, or behavioural targeting. Digital Ad Spend in US & Canada (USD).

Appendices

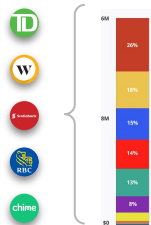# How the Advertising Channel Scan™ Methodology Works

Define the competitors.

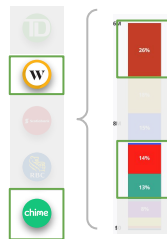**Measure their digital ad spend across relevant ad platforms.**

Cross-check spend, impression, and click metrics using multiple data sources.
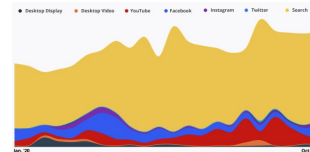
Break down spend by platform and competitor.

Highlight top performing platforms and competitors.

Highlight seasonal and YoY trends.

Things To Know About Marketing Intelligence Data

Metrics from marketing intelligence tools will never exactly match 'internal' tools

We typically expect metrics from marketing intelligence tools to vary by 5-25% compared to internal measurement tools like Google Analytics, Advertising Accounts, and so on. It all varies from tool to tool because each tool collects data differently. Sometimes metrics match bang on, other times there's a significant spread. The most common reason for variations is how different tools handle bot traffic. For this reason, we don't base our analyses too heavily on *absolute* figures, but rather focus on *relative* figures and trends over time.

Relationships between brands tend to be very reliable

We can see how 'big' or 'small' brands' metrics are in comparison to each other really accurately. For example, that Red Bull's website traffic is 4x higher than Monster Energy. Or that Loblaw's ad spend in Canada is 10x more than Safeway's. We've verified this with multiple past clients whose 'internal' data we had access to. Knowing accurately the relationship between brands is more strategically important than matching exact figures.

Trendlines over time tend to be very reliable

We can see how metrics are changing *over time* quite accurately. For example, that Canadian Tire's web traffic increased by 20% in Q2 and 40% in Q3. We've verified this with multiple past clients whose 'internal' data we had access to. Knowing accurately how things trend over time is more strategically important than matching exact figures.

WHAT brands are doing is the easiest thing to observe

This is the most important point. Once we measure *how much* a brand's metrics are changing over time, we hone in on the biggest shifts and can see *the actions* that brand is taking to move those metrics. We can see the exact ads that brands run on all major platforms, how all their social posts are performing, where their traffic is coming from, what technologies and conversion strategies they're using on their sites, what emails they are sending, to what segment of their list, and how often, etc. This is the best source to identify the causation of changes to the metrics.

Data Source Caveat

Estimated Ad Spend

Our research/data tools *cannot* detect ad spend that is based on (a) re-targeting or (b) heavily personalized targeting (ex. Males, 18-24, in Hamilton Ontario, that have interests in Soccer, Xbox, Minecraft, Drake, and Korean Food) . They *can* detect ad spend that is cold targeted with relatively broad targeting (ex. Males, 18-24, in Canada, with interests in Soccer and Xbox)

Because of this limitation, "estimated ad spend" is typically lower than true total ad spend for a given brand. That said, we have independently validated that trend lines over time and differences in proportional ad spend while comparing multiple brands is typically very directionally accurate.

For more detail, please see our article Things To Know About Marketing Intelligence Data. If you'd like to dig deeper into our data partners and their methodologies please see RightMetric's Principle Data Partners.

While not perfect, we are confident that our data partners offer the most accurate and holistic data that is currently commercially available. We also believe that making decisions based on a non-perfect view of this data is far better than making decisions without any of this data.

Data Sources Used in This Research

Pathmatics
BY SENSOR TOWER

SimilarWeb

semrush

[Data Collection Methodology Page →](#)

[Data Collection Methodology Page →](#)

[Data Collection Methodology Page →](#)

Typically Used to Track / Corroborate:

- Direct vs. Programmatic Buys
- Placements by Channel
- Funnel Deconstruction
- Estimated Ad Spend
- Active Creatives
- Landing Pages
- Display Ads
- Social Ads
- Ad Copy
- CPM
- CTR

Typically Used to Track / Corroborate:

- Placements by Channel
- Funnel Deconstruction
- Estimated Ad Spend
- Search Ad Position
- Active Creatives
- Site Traffic
- App Usage
- Search Ads
- Display Ads
- Ad Copy

Typically Used to Track / Corroborate:

- Estimated Ad Spend
- Search Ad Position
- SERP Rankings
- Site Traffic
- Search Ads
- Ad Copy