North America photo printing trends through May 8th, 2020
Analysis compares pre vs. post timeframes

Pre = first week of January through first week of March

Post = second week of March onward

Determined by the COVID-19 US National Emergency Declaration date
Photo printing searches up 53% year-over-year (YoY) during post period

Clicks growing YoY but growth slowing during post period

Traffic sources remain steady
Searches spiking throughout post period

Searches with pre-COVID-19 forecast

Searches +53%

vs. 2019 post

(vs. +5% during pre)
Search growth outpacing click growth, indicating unmet demand

Pre vs. post searches and clicks

**Searches YoY**
- Pre: 5%
- Post: 53%

**Clicks YoY**
- Pre: 39%
- Post: 14%
Traffic sources remain steady since March

Share of clicks pre vs. post

Type

Pre: 88%
Post: 88%

Audience

Pre: 10%
Post: 10%

Device

Pre
Post

PC
86%
87%

Mobile
8%
7%

Tablet
7%
6%

Focus

Pre: 50%
Post: 50%

Brand

50%

Nonbrand

50%
APAC photo printing trends through May 8th, 2020
Analysis compares pre vs. post timeframes

Determined by the COVID-19 US National Emergency Declaration date

Pre = first week of January through first week of March

Post = second week of March onward
Photo printing searches up 90% YoY during post period

Clicks up 151% YoY after an already fast start in 2020

Audience ads now represent nearly 20% of clicks
Searches spike throughout post period

Searches +90% vs. 2019 post (vs. +11% during pre)

Microsoft Advertising Internal Data, APAC
Click growth accelerated in mid-March

Pre vs. post searches & clicks

Searches YoY
- Pre: 11%
- Post: 90%

Clicks YoY
- Pre: 75%
- Post: 151%
Audience now represents nearly 20% of all photo printing clicks

Share of clicks pre vs. post

- **Type**
  - Pre: 97%
  - Post: 82%
  - Audience: 17%

- **Device**
  - Pre PC: 96%
  - Post PC: 94%
  - Mobile: 99%

- **Focus**
  - Pre Nonbrand: 99%
  - Post Nonbrand: 99%
EMEA photo printing trends through May 8th, 2020
Analysis compares pre vs. post timeframes

Determined by the COVID-19 US National Emergency Declaration date

Pre = first week of January through first week of March
Post = second week of March onward
Photo printing searches up 7% YoY during post period

Clicks up 61% YoY after a relatively flat start to 2020

Traffic sources remain steady
Search volume now above 2019 levels

Searches +7% vs. 2019 post
(vs. -38% during pre)
Searches and clicks growing YoY in tandem since mid-March

Pre vs. post YoY searches and clicks

Searches YoY:
- Pre: -38%
- Post: +7%

Clicks YoY:
- Pre: +3%
- Post: +61%
Traffic sources remain steady since March

Share of clicks pre vs. post

**Type**
- Text
  - Pre: 90%
  - Post: 88%
  - Audience: 10%

**Device**
- PC
  - Pre: 91%
  - Post: 87%
  - Mobile: 10%

**Focus**
- Nonbrand
  - Pre: 100%
  - Post: 100%
Strategies and recommendations
