



GLOBAL CRUISE MARKET DEVELOPMENT TREND AND ASIA CRUISE MARKET

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History of the Asian Market 2008 to 2016



'CRUISE FROM THE FUTURE' – Quantum Class





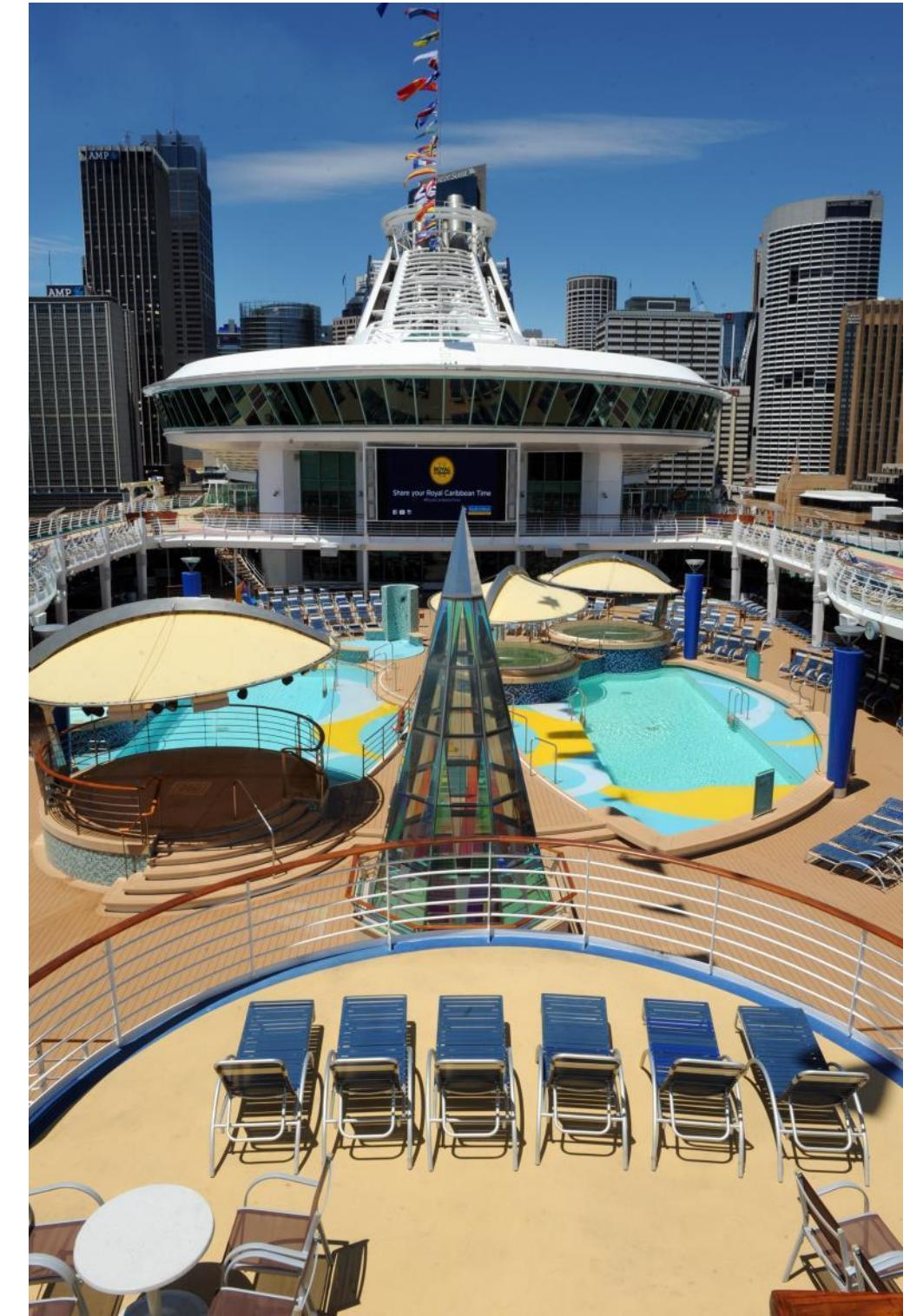
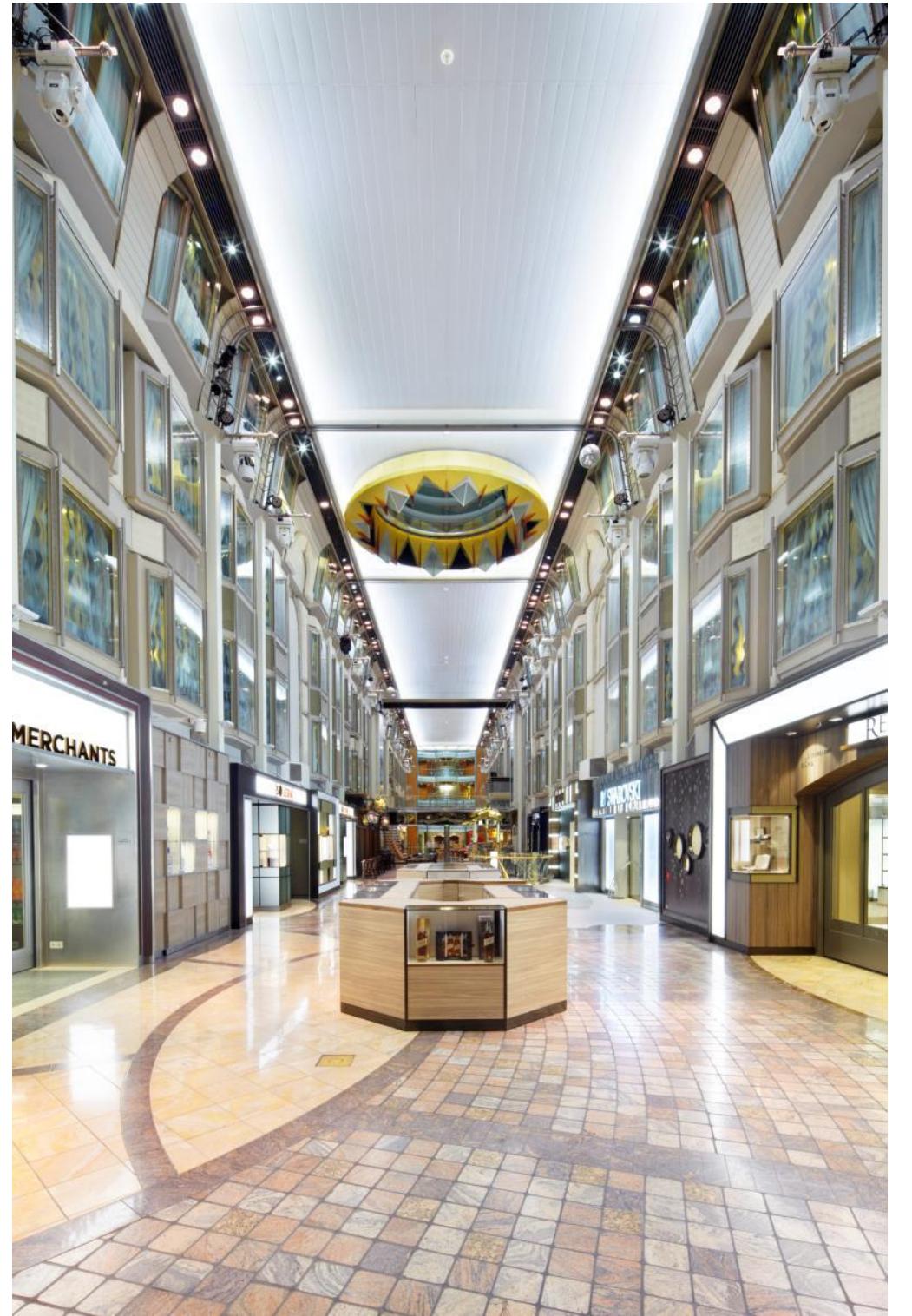
皇家加勒比
ROYAL CARIBBEAN



CHINA DEPLOYMENT 2016



Voyager's Season in Taiwan



The Demographics

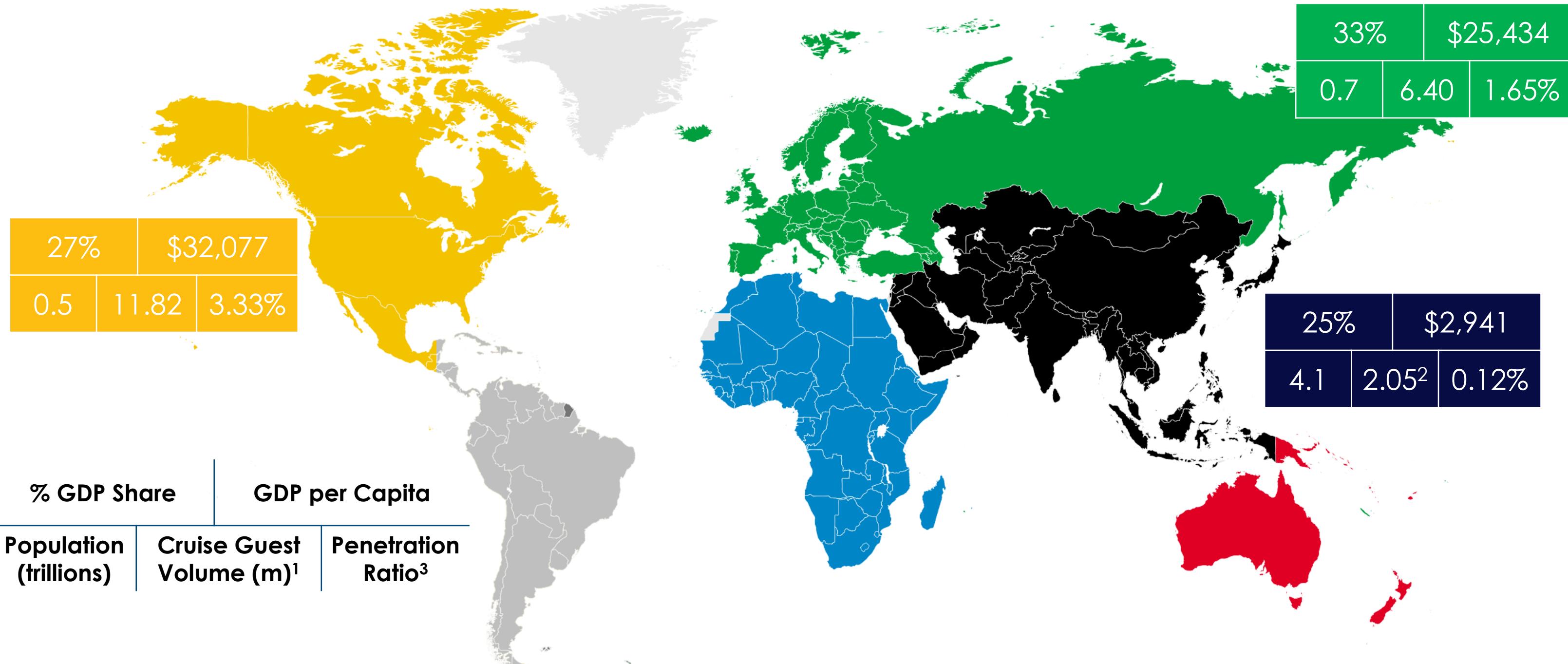


Product Adaption to the Market

- Food
- Restaurant
- Service



WORLDWIDE DISTRIBUTION OF GUEST VOLUME & PENETRATION RATIO



Source: United Nations World Urbanization Prospects, IMF, CLIA

1. All data are as of 2013; 2. Only include East Asia, Southeast Asia, and South Asia; 3. Only calculate core markets. Data are as of 2013

POTENTIAL MARKET SIZE

Population

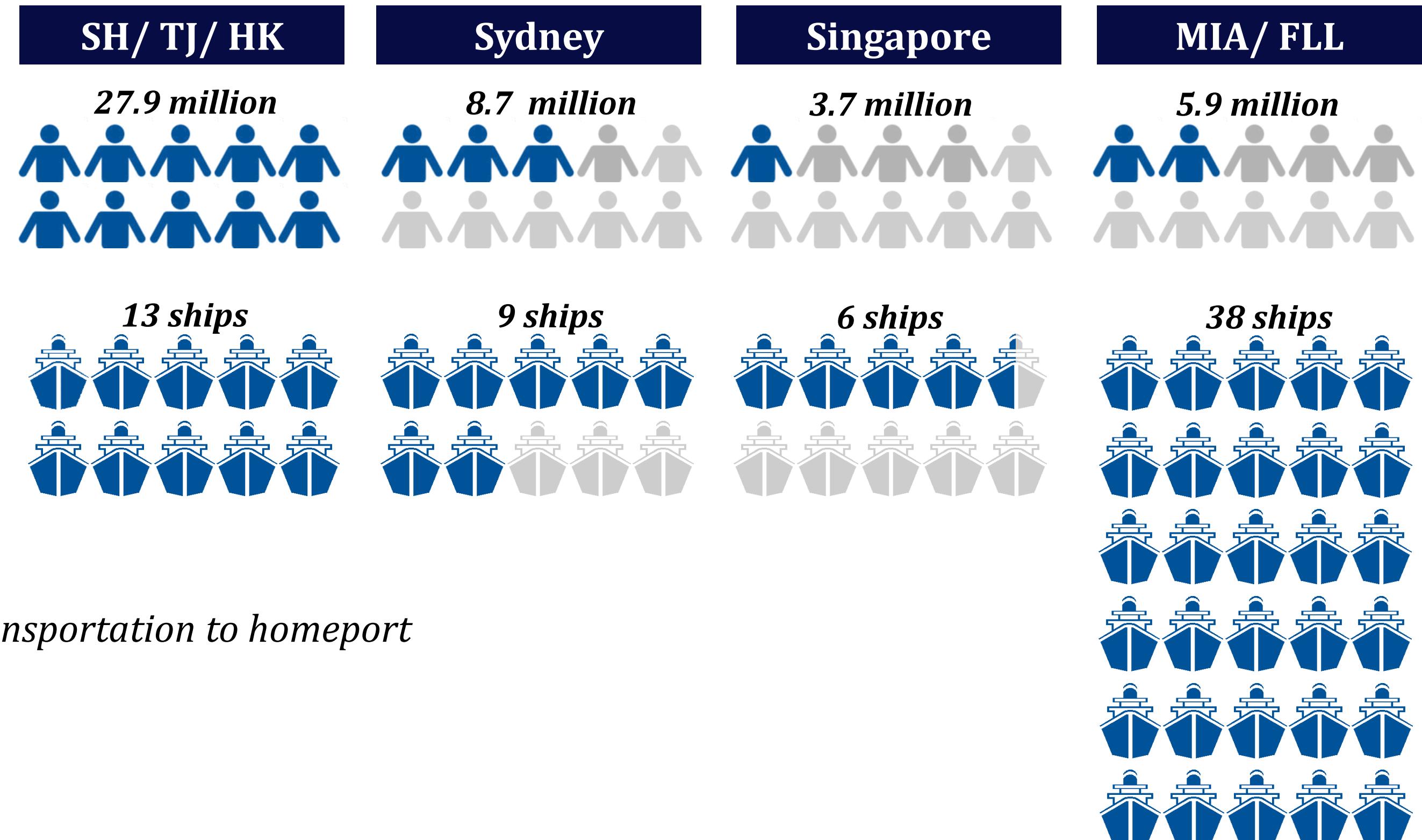
- Living in key catchment area*
- w/ > \$40k annual household income

of Ships

- Being deployed for > 3 months in 2016

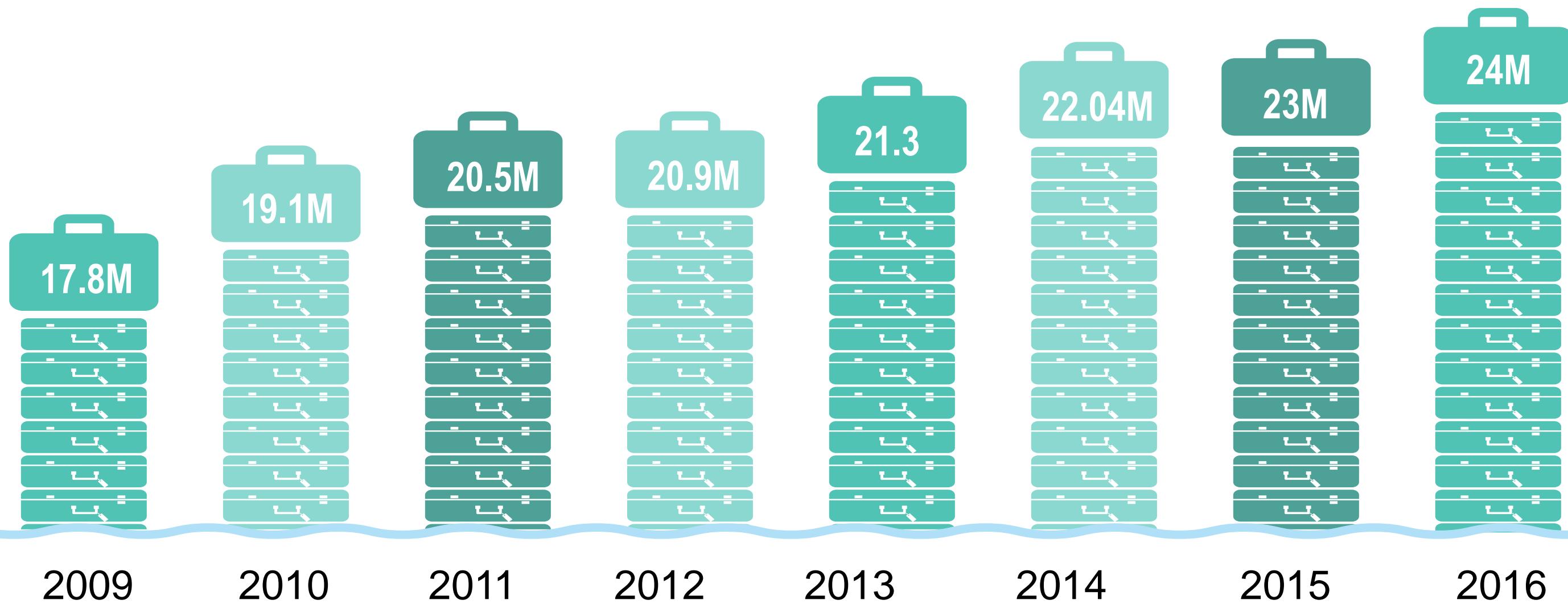
**within 3 hours transportation to homeport*

Source: C-GIDD data



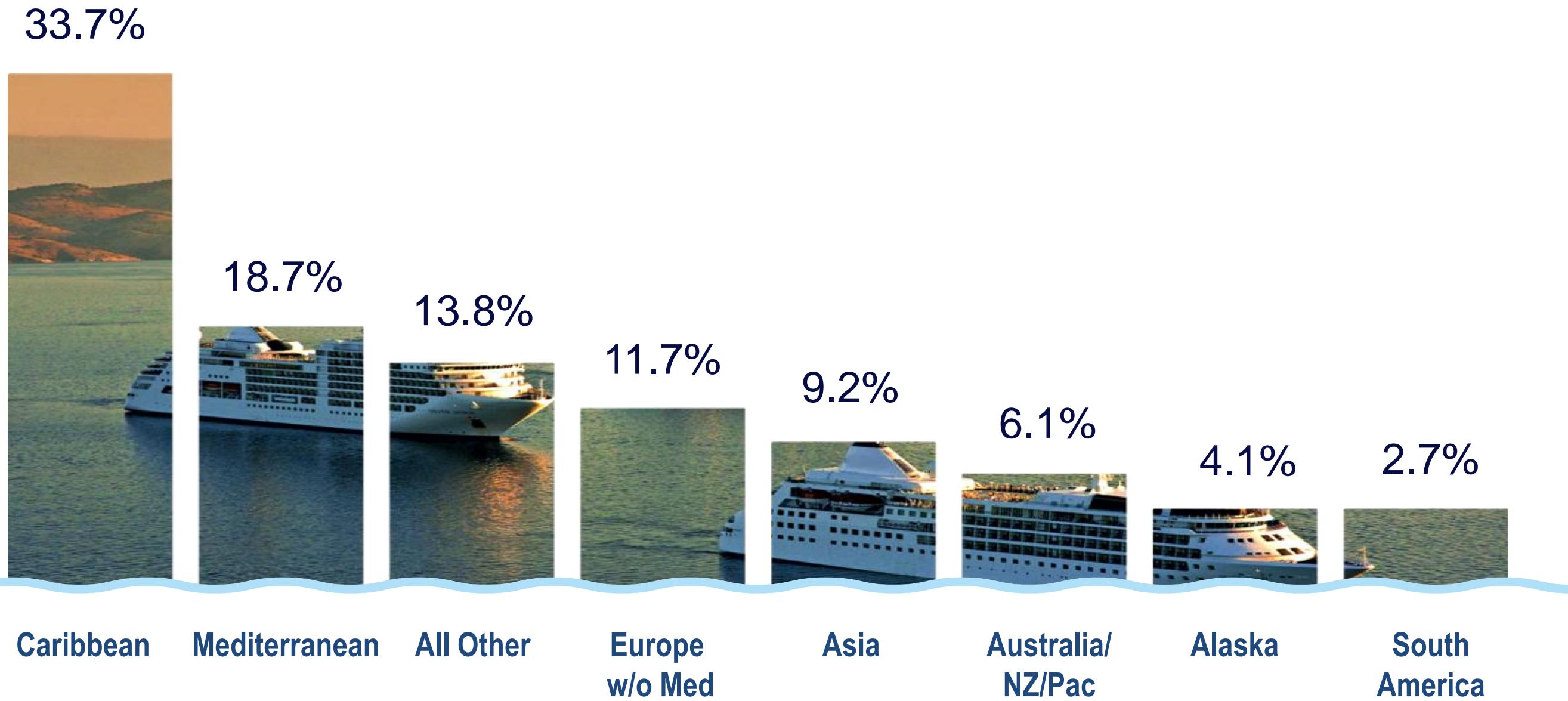
2016 Passenger Capacity Snapshot

2016 = 24 Million Passengers Expected to Cruise



Regional Deployment

2016 Cruise Line Deployment, by Region – % ALBD*



Thank you