



GLOBAL CRUISE MARKET DEVELOPMENT TREND AND ASIA CRUISE MARKET

SIMON WEIR

Chief Operations Officer
China and North APAC

History of the Asian Market

2008 to 2016



‘CRUISE FROM THE FUTURE’ – Quantum Class





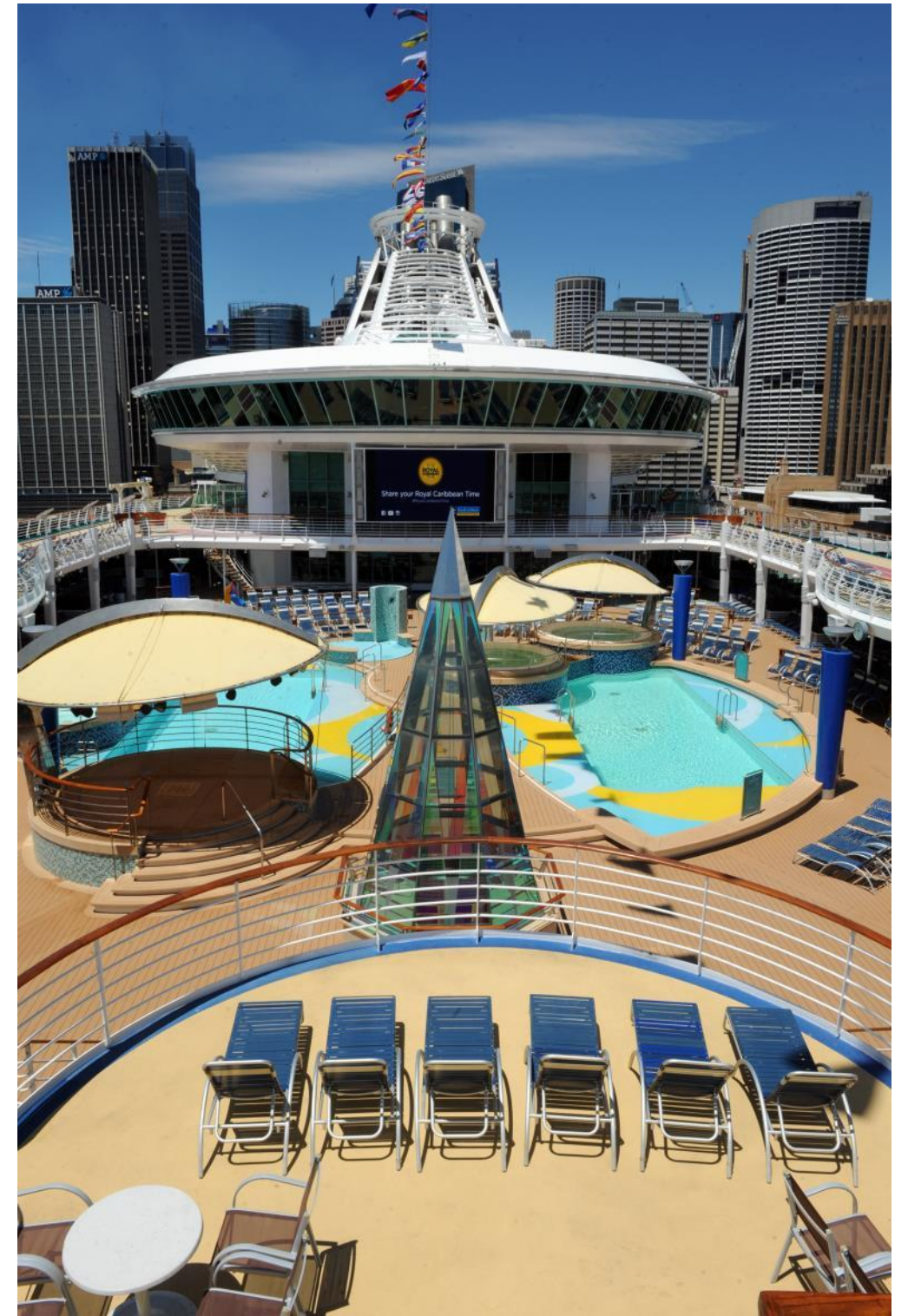
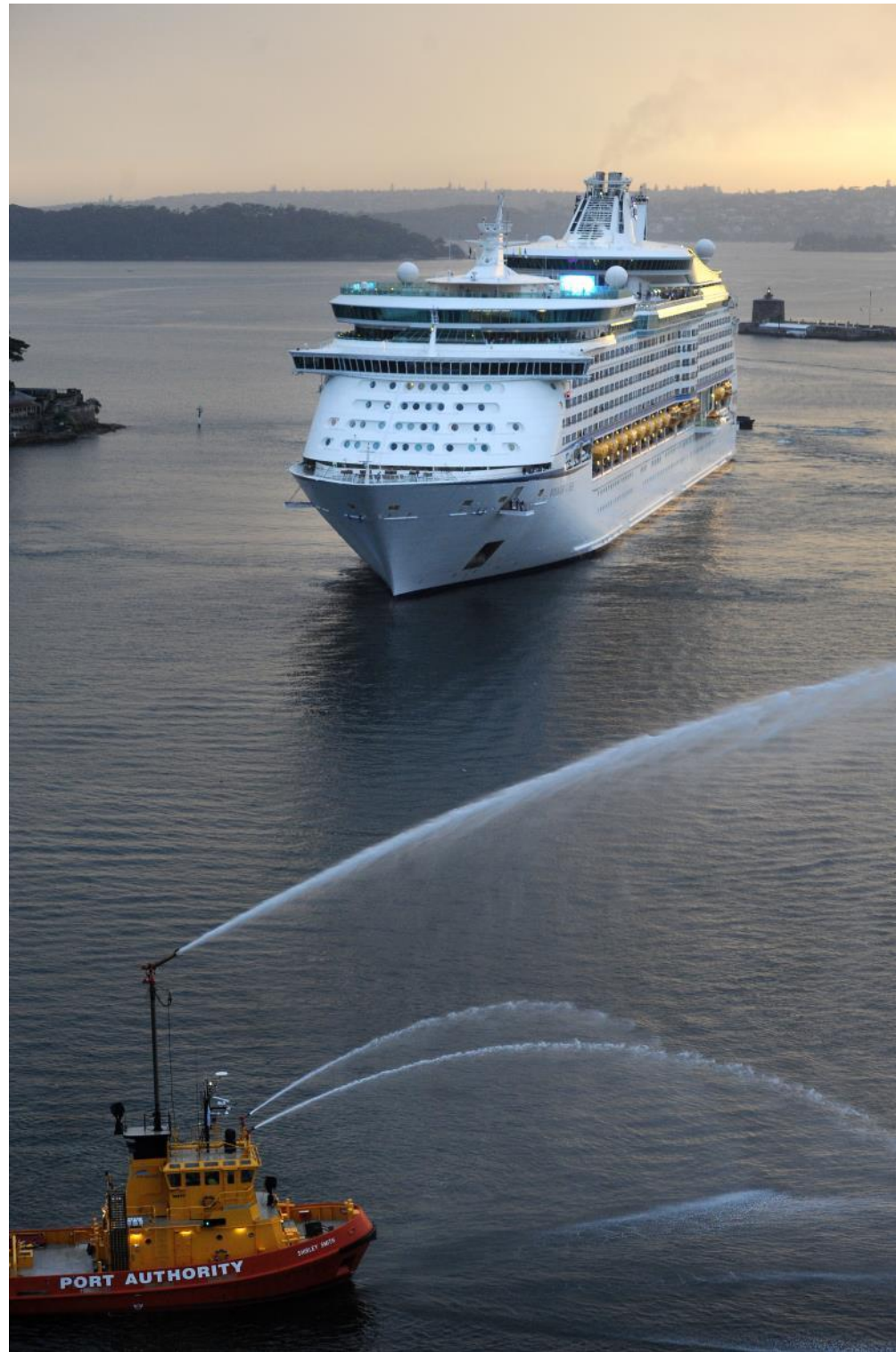
皇家加勒比
ROYAL CARIBBEAN



CHINA DEPLOYMENT 2016



Voyager's Season in Taiwan



The Demographics

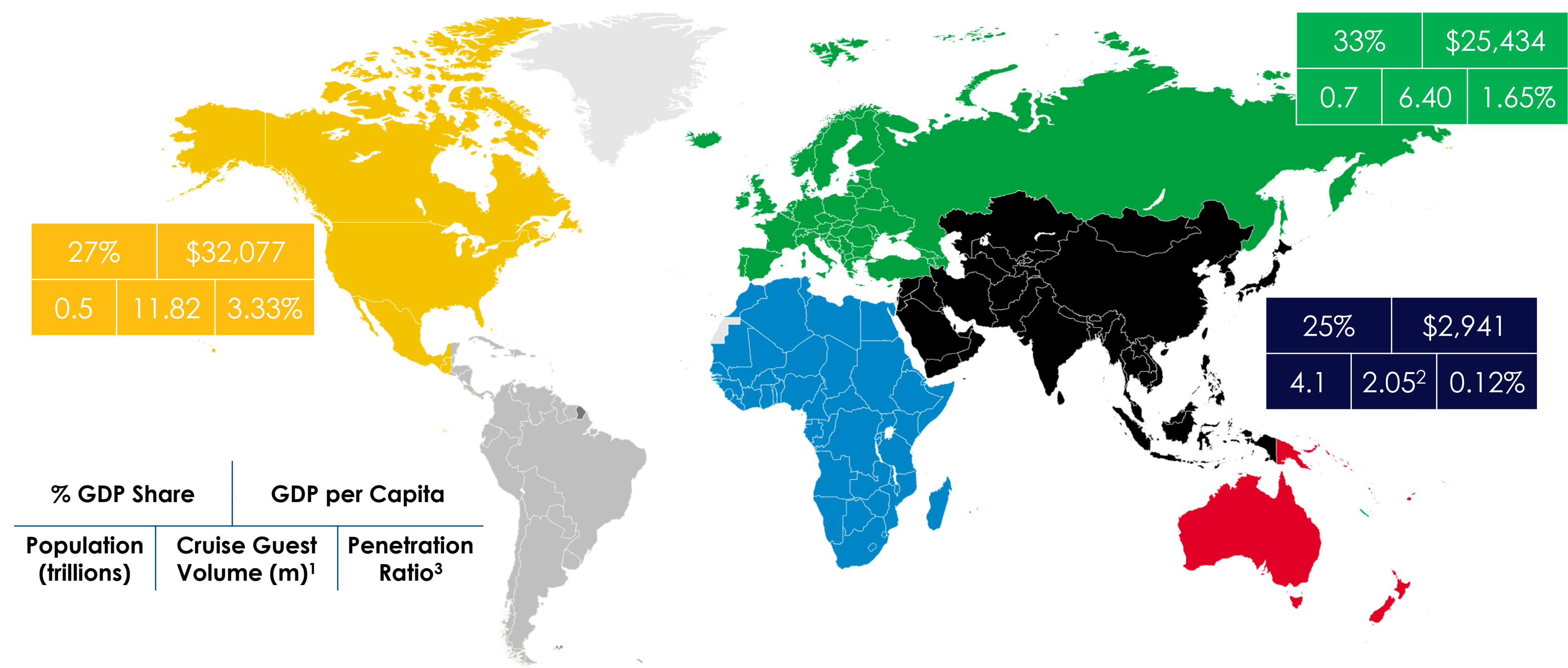


Product Adaption to the Market

- **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

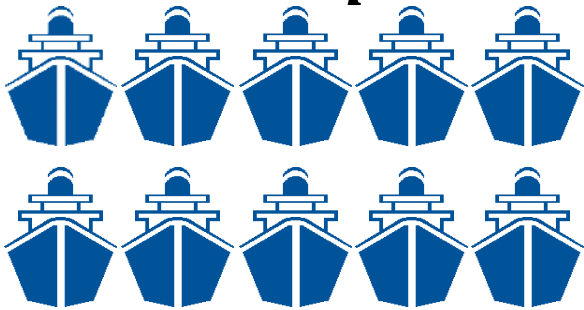
- Being deployed for > 3 months in 2016

SH/ TJ/ HK

27.9 million



13 ships

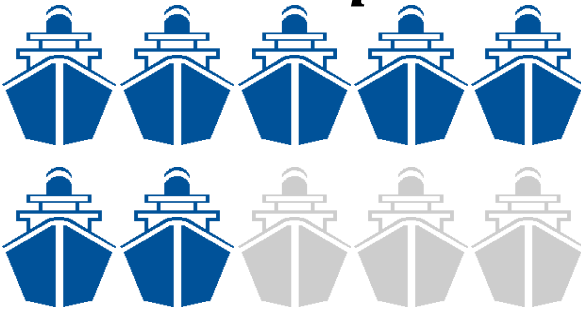


Sydney

8.7 million



9 ships

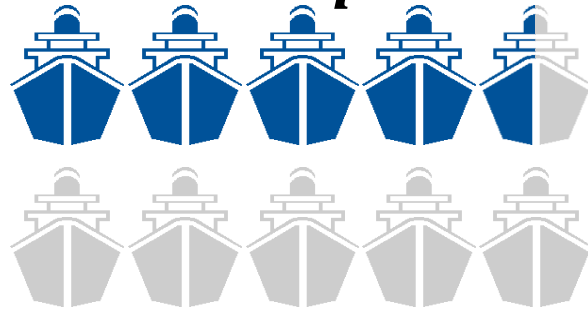


Singapore

3.7 million

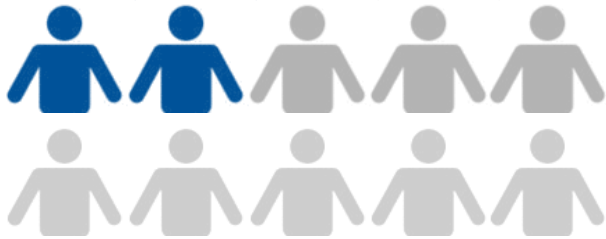


6 ships

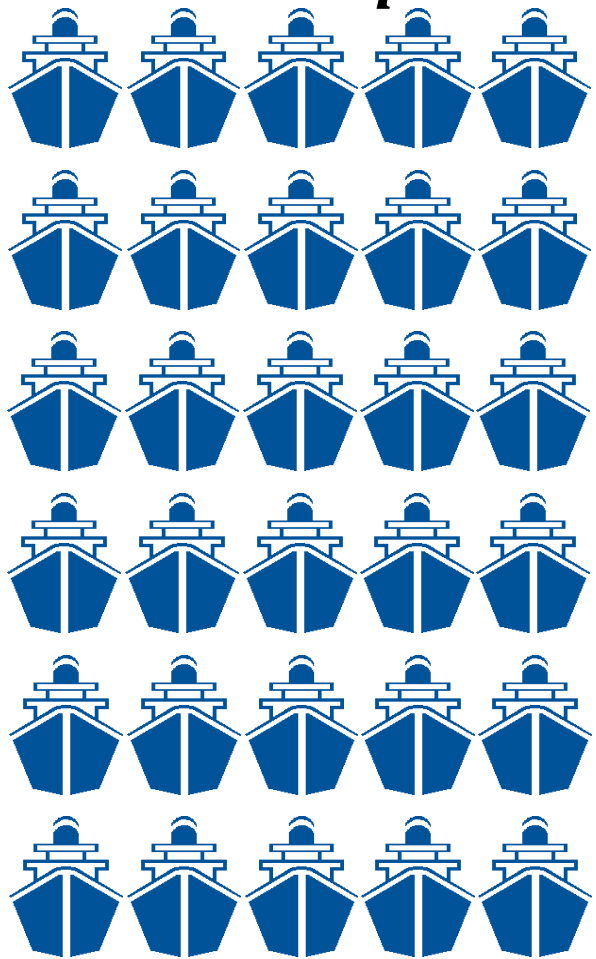


MIA/ FLL

5.9 million



38 ships

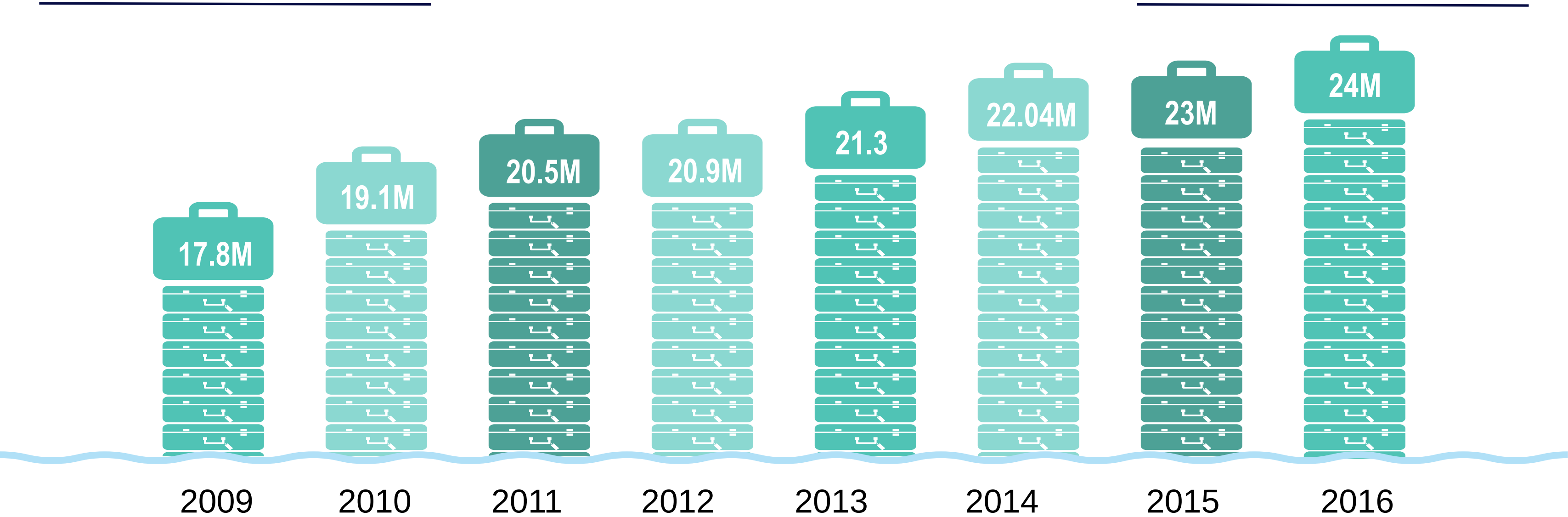


**within 3 hours transportation to homeport*

Source: C-GIDD data

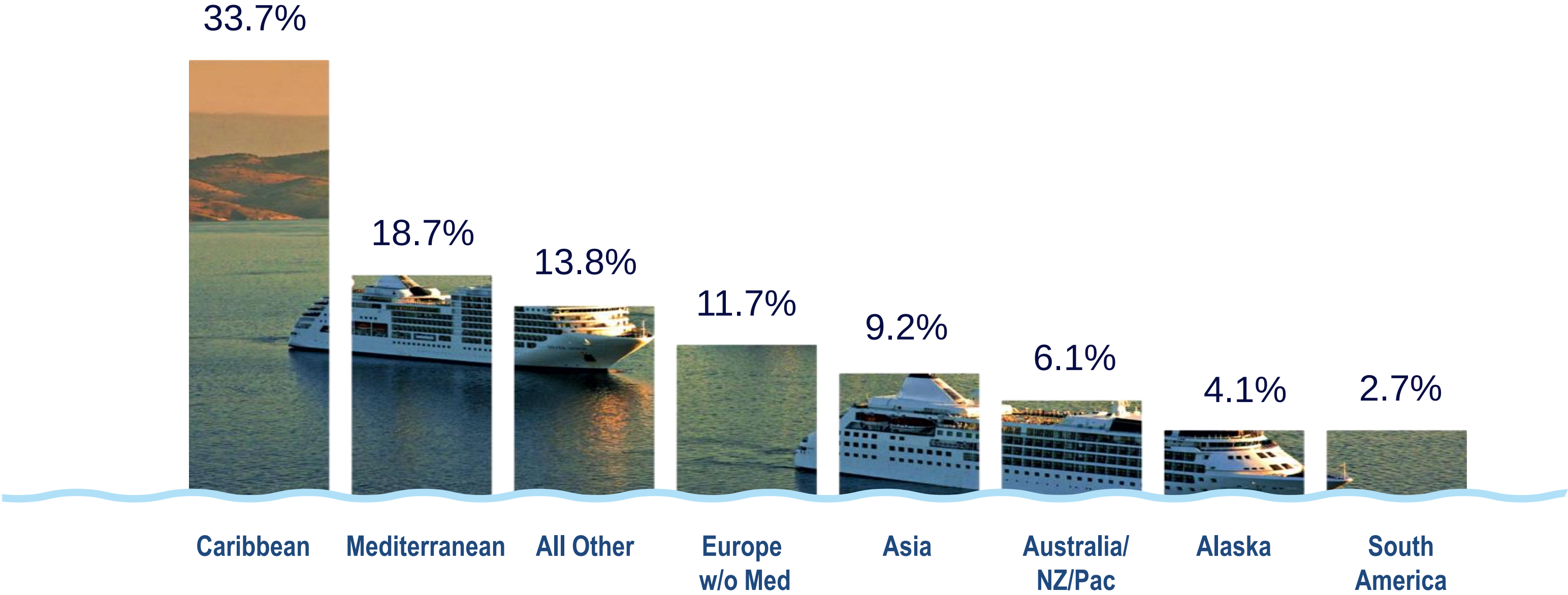
2016 Passenger Capacity Snapshot

2016 = 24 Million Passengers Expected to Cruise



Regional Deployment

2016 Cruise Line Deployment, by Region – % ALBD*



Thank you