

LATAM Disney Family Market Snapshot 2025

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SECTION 01

Market Overview — LATAM Family Segment

- 1,050 Disney families (70% of annual portfolio)
- +30% year-over-year growth
- 1,600 families projected (2026 Strategic Target)
- 60% repeat rate
- 80% referral rate

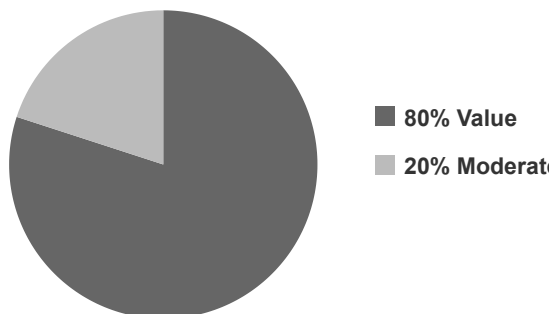
This growth trajectory reflects structured expansion driven by repeat dynamics, referral behavior, and coordinated segment organization within the LATAM family market.

SECTION 02

Resort Category Breakdown

- 80% Value Resorts
- 20% Moderate Resorts
- Leading Moderate Resort: Port Orleans Riverside

The segment demonstrates price-driven decision behavior with selective experiential upgrades when value perception is clearly structured.

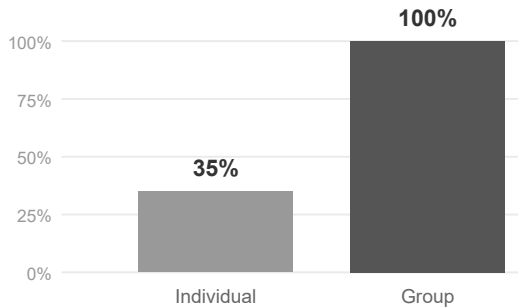


SECTION 03

Dining Plan Adoption & Consumption Behavior

- 35% individual Dining Plan adoption
- 60% grocery optimization behavior
- 100% Dining Plan adoption in structured group model

Adoption rates increase significantly when structured guidance and coordinated planning are implemented.



SECTION 04

Stay Duration & Booking Window

- 6 nights average stay
- 4 park days average
- 6-month advance booking window

The segment reflects structured planning behavior and seasonal predictability aligned with the regional academic calendar.

SECTION 05

Add-On Penetration & Upsell Opportunity

- 20% Park Hopper
- 30% Genie+

- 20% Memory Maker

Upsell penetration indicates growth potential through structured pre-arrival education and aligned segment messaging.

SECTION 06

Coordinated Group Model — 2025 Pilot

- 35-family structured group
- Standardized package (6N / 4D)
- Unified resort allocation
- Coordinated in-park execution
- 100% Dining Plan adoption
- Expansion model projected for 2026

The pilot demonstrated structured scalability, coordinated consumption, and segment cohesion.

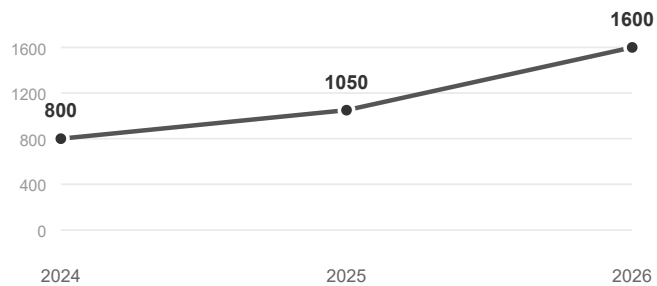
SECTION 07

Strategic Integration & Segment Reinforcement

- Structured LATAM family segment with demonstrated repeat dynamics
- Coordinated seasonal distribution aligned with school calendar
- Scalable group expansion model
- Established digital communication channel within the LATAM family segment
- Monthly organic reach exceeding 2.7M impressions
- Reinforcement capacity for operational clarity and structured consumption messaging

We are not seeking to operate independently from Disney's ecosystem. Our objective is to reinforce and structure the LATAM family segment in alignment with regional strategy, contributing to optimized preparation, coordinated execution, and long-term segment growth.

Growth Projection



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