DIRECTV PARA TODOS means "programming for everyone"

Service launched on October 15, 1999

Two Spanish/English programming packages to serve the multi-lingual, multi-generational household

New DIRECTV PARA TODOS™ branded receiver and dish; on-screen menus in Spanish and English

Can receive all existing DIRECTV® services

Dedicated bilingual Customer Service Center open 24 hours per day, 7 days per week: 1-888-388-6622

Television viewing plays a key role within the U.S. Hispanic family experience

Most U.S. cities limited to two over-the-air Spanish stations (Univision & Telemundo affiliates)

Current Hispanic programming options in the U.S. are not addressing the various regional, age-level, and gender needs of the Hispanic population

Cable penetration growing but still limited (65% penetration in most markets). Low penetration of cable among Hispanics is due to lack of relevant programming, not cost considerations:

Price $\neq$ Value

Satellite very underdeveloped (7% - 8% penetration)

October 1999	January 2000	March 2000
SF/SJ	SF/SJ	SF/SJ
Miami	Miami	Miami
Houston	Houston	Houston
	Dallas	Dallas
	El Paso	El Paso
	San Diego	San Diego
	Fresno	Fresno
	Sacramento	Sacramento
	Phoenix	Phoenix
	Los Angeles	Los Angeles
		San Antonio
		McAllen/Brownsville
		Chicago
		New York
		Albuquerque
		Denver

Reflects ranking of Hispanic markets nationwide.