



# Fidelman & Co.



## QUESTION

### Mass media access: North America

---

#### INSIGHTS

- In the United States, there is no television access for around 3.5% of the population, no radio access for around 5% of the population, and no internet access for around 16% of the population.
- In Mexico, there is no television access for around 6.9% of the population, no radio access for around 38.5% of the population, and no internet access for around 59.3% of the population.
- In Panama, there is no television access for around 6% of the population, no radio access for around 40% of the population, and no internet access for around 30.9% of the population.

## OVERVIEW

The following are percentages of country populations without access to television, internet, and radio: the United States, 3.5%; Canada, 3%; Mexico, 6.9%; and Panama, 6%. It is assumed that these citizens cannot be directly reached during times of crisis.

## THE UNITED STATES

In the U.S., approximately [119.6 million \(2\)](#), or [96.5% \(1\)](#) of homes contain at least one television that receives traditional signals so far in 2018. This leaves approximately 3.5% without television access. [Consumer age \(7\)](#) is a huge factor for television ownership, as the younger generation often has no need for a television once they move out of their family home. In 2016, [95% \(3\)](#) of homes had radio penetration, leaving 5% without access. Internet access is available to around [106.07 million \(4\)](#) homes, out of a total [125.82 million \(5\)](#) in 2016. 106.07 million divided by 125.82 million equals roughly 84% of homes with internet access, leaving 16% without access. In the U.S., the major barriers are the cost of internet, with [23% \(6\)](#) of urban areas without access, and [28% \(6\)](#) in rural areas. Overall, this means that 3.5% likely has no media access during times of crisis.

## CANADA

Canada has a [97% \(8\)](#) penetration rate for television, leaving 3% of the population without access. In 2016, Canada's radio access was approximately [89% \(14\)](#) of the population, leaving 11% without access. Internet access reached approximately [90.9% \(9\)](#) of the population in 2017, giving them the [14th highest \(9\)](#) penetration rate in the world. This leaves just over 9% of the population without access. In Canada, the demographics that live without internet tend to be those who [did not finish \(10\)](#) high school, those who earn less than [\\$35,000 combined \(10\)](#) household income, and those over the [age of 65 \(10\)](#). [Northern and remote \(21\)](#) regions, especially, have little to no internet access regardless of the aforementioned demographics, because of [insufficient network \(21\)](#) capacity. Overall, this means that 3% likely has no media access during times of crisis.

## MEXICO

Television access in Mexico reached roughly [93.1% \(12\)](#) of the country's population, leaving around 6.9% without access. The radio penetration rate was only [61.5% \(13\)](#) of the population, leaving 38.5% without access. Internet access for Mexican citizens reaches a dismal [43.7%, \(11\)](#) leaving 56.27% without any access. Mexico has a very poor [communication infrastructure \(19\)](#) in many isolated towns, leaving many people in the dark during emergencies. Some parts of the country survive via a rudimentary [radio](#)

[network \(19\)](#) or makeshift cell [signal repeaters \(19\)](#). Overall, this means that 6.9% likely has no media access during times of crisis.

## PANAMA

The most recent data about Panama's television penetration comes from 2013 data, stating the penetration rate to be roughly [94% \(17\)](#). This leaves 6% without access. Radio access is also gathered from 2013 data, stating that radio reached about [60% \(18\)](#) of the population, leaving 40% without access. Data about internet penetration in Panama comes from more recent sources, stating that between [69.1% \(15\)](#) and [70% \(16\)](#) of their citizens have access. This leaves 30% to 30.9% without internet. Rural areas of Panama are mostly inhabited by [poverty-stricken \(20\)](#) indigenous people. The poverty level reaches over [70% \(20\)](#) in these areas, leading to poor [communications infrastructure \(20\)](#) on top of unsanitary living conditions. Overall, this means that 6% likely has no media access during times of crisis.

## CONCLUSION

In the United States, 3.5% likely has no media access during times of crisis. In Canada, that number is closer to 3%. Mexico sees about 6.9% of its citizens without media access, and Panama has around 6% of its population without media access.

## SOURCES

## 1) US TV Access | Nielsen Estimates 2017

<http://www.nielsen.com/us/en/insights/news/2017/nielsen-estimates-119-6-million-us-tv-homes-2017-2018-tv-season.html>

## 2) Number of TV households in the U.S. | Statista

<https://www.statista.com/statistics/243789/number-of-tv-households-in-the-us/>

## 3) US Radio Access

<http://guarantymedia.com/95-of-u-s-households-have-at-least-one-broadcast-radio-receiver/>

## 4) U.S. households with broadband internet 2016 | Statista

<https://www.statista.com/statistics/183614/us-households-with-broadband-internet-access-since-2009/>

## 5) Number of households in the U.S. 1960-2017 | Statista

<https://www.statista.com/statistics/183635/number-of-households-in-the-us/>

## 6) US Internet Access | Impediments

<https://www.recode.net/2017/6/20/15839626/disparity-between-urban-rural-internet-access-major-economies>

## 7) American homes have fewer TVs on average than they did in 2009 - ExtremeTech

<https://www.extremetech.com/electronics/245196-american-homes-fewer-tvs-average-2009>

## 8) Canada TV Penetration Rate

<http://playbackonline.ca/2016/11/21/how-does-canadas-tv-consumption-compare-to-the-rest-of-the-world/>

## 9) Canada Internet Penetration Rate | Internet World Stats

<http://www.internetworldstats.com/top25.htm>

## 10) Canadian Internet Connectivity

<http://mediaincanada.com/2017/03/21/canadian-internet-use-has-reached-saturation-study/>

## 11) Mexico internet user penetration 2015-2021 | Statista

<https://www.statista.com/statistics/379973/mexico-internet-user-penetration/>

## 12) TV household penetration in Mexico 2016 | Statista

<https://www.statista.com/statistics/712871/tv-household-penetration-mexico/>

## 13) Radio household penetration in Mexico 2016 | Statista

<https://www.statista.com/statistics/712883/radio-household-penetration-mexico/>

## 14) Canada selected media reach 2016 | Statista

<https://www.statista.com/statistics/261807/reach-of-select-media-in-canada/>

## 15) Panama Internet Penetration | IWS

<http://www.internetworldstats.com/stats12.htm>

16) Digital in 2017: Central America

<https://www.slideshare.net/wearesocialsg/digital-in-2017-central-america>

17) TV Penetration | Panama

[http://www.scielo.br/pdf/interc/v38n1/en\\_1809-5844-interc-38-01-0085.pdf](http://www.scielo.br/pdf/interc/v38n1/en_1809-5844-interc-38-01-0085.pdf)

18) Radio reach in Latin America 2013 | Statistic

<https://www.statista.com/statistics/275980/radio-reach-in-latin-america/>

19) As Mexico lauds telecom reform, rural poor search for connection

<https://www.reuters.com/article/us-mexico-telecoms/as-mexico-lauds-telecom-reform-rural-poor-search-for-connection-idUSKCN12R0HH>

20) Panama Overview | World Bank

<http://www.worldbank.org/en/country/panama/overview>

21) Communication Challenges | Canada

<https://fcm.ca/home/issues/northern-and-remote/northern-broadband.htm>