



Fidelman & Co.



QUESTION

Mass media access: South America

INSIGHTS

- 84% of Colombian households have a TV set, the lowest proportion of any country we looked at.
- Brazil had the highest rate of TV penetration, with 97% of households reporting they have a set.

OVERVIEW

Media penetration across South America is widely varied. Some countries, such as Colombia, have very high rates of non-access to television and internet, while others, such as Argentina, have extremely high rates of media and electricity access. We have researched mass media penetration in Brazil, Argentina, and Colombia, along with Venezuela, and Uruguay, and presented the findings for each country under the relevant header below.

Statistics on radio ownership or access in these countries simply are not available. This may be due to information-sharing practices within the country or the competitive marketplace. What scant figures do exist are more than twenty years out-of-date. Therefore, we have chosen to focus on television as the key metric of mass media penetration—this makes particular sense as television use may in fact be higher than radio use in many of these countries. In Brazil, for instance, just [80% \(22\)](#) of people report listening to the radio, while we found that [97% \(1\)](#) of households had televisions. It should also be noted that some data is less recent than what Wonder would usually report, since large scale research of this type is difficult, particularly in rural areas, and therefore is conducted infrequently.

We were not able to find direct statistics on the number of inaccessible or difficult to access people in each country, however we noticed that the World Bank often uses lack of electricity access to measure inaccessibility, so we followed their lead and have provided figures on electricity access in each country as a way of approximating the number of people inaccessible in a crisis.

colombia

Colombia has the highest rate of no-internet access among the five countries studied. Only [58.1% \(3\)](#) of the population of Colombia have internet access, which leaves [41.9% \(3\)](#) without it. When it comes to TV, penetration is much higher with [84% \(12\)](#) of Colombian households possessing a TV set. If we compare these figures with the total number of households in Colombia ([14 million \(16\)](#)) by multiplying that total number of households by (1-0.84) or 0.16 we find that there are about 2.24 million households in Colombia without access to TV. Finally, according to the most recent available data from the World Bank, [97.8% \(8\)](#) of Colombia's total population has access to electricity, but that figure falls to just [90.5% \(8\)](#) in rural areas.

brazil

In Brazil, media penetration is quite a bit higher than in Colombia. [Sixty-eight percent \(1\)](#) of households have Internet access, leaving [32% \(1\)](#) without. Fully [97% \(1\)](#) of Brazilian households have a TV set, leaving just [3% \(1\)](#) without. There are [64.8 million \(17\)](#)

households in Brazil, so this means that there are about 1.94 million without television access. Finally, [99.65% \(6\)](#) of Brazil's overall population has access to electricity, falling to [97.8% \(6\)](#) among the rural population. This leaves about 2.2% of the rural population who are left inaccessible in a crisis.

argentina

In Argentina, [78.6% \(4\)](#) of the population has internet access, leaving [21.4% \(4\)](#) of the population without it. [96.97% \(18\)](#) of Argentina's population has access to television, leaving 3.03%, or about 1.33 million of Argentina's [44.27 million \(19\)](#) people, without media access. Finally, according to the World Bank, though in 2012 [4.25% \(7\)](#) of Argentina's rural population still lacked electricity, by 2014 Argentina had achieved electricity access for [100% \(7\)](#) of its population.

venezuela

In Venezuela, [60.0% \(9\)](#) of the population have access to the Internet, leaving approximately [40% \(9\)](#) without it. Just [91.5% \(23\)](#) Venezuelan households have a television, leaving [8.5% \(23\)](#), or 726,750 of their [8.55 million \(20\)](#) households without it. Finally, while [99.11% \(10\)](#) of Venezuela's overall population has access to electricity, that figure falls to [92.04% \(10\)](#) of the population in rural areas.

uruguay

In Uruguay, [69.4% \(5\)](#) of the population has access to the internet, meaning that about [30.6% \(5\)](#) do not. When it comes to TV, [92.9% \(18\)](#) of the Uruguayan population has access, leaving [7.1% \(18\)](#), or about 245,660 of Uruguay's [3.46 million people \(21\)](#) without media access. Finally, [99.66% \(11\)](#) of Uruguay's overall population has electricity, however that figure drops to [97.04% \(11\)](#) in rural areas.

conclusion

As you can see, while most people in these five countries do have mass media access, there is a substantial number who don't, presenting a large potential market. The countries with the largest percentage of the population without media access are Colombia, which has [84% \(12\)](#) TV penetration, and Venezuela, which has [91.5% \(23\)](#) TV penetration. The country with the largest percentage of inaccessible people is Colombia, where [90.5% \(8\)](#) of rural households have electricity.

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