

Social Portrait of Online Media Audience: Changing Trends and Preferences among Russians

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The rapid spreading of the Internet and virtual ways of communication actualizes the issue of compiling a sociological portrait of online mass media audience. The study examined the socio-demographic composition of online media audience in Russia in the dynamics over the last ten years from 2008 to 2018. The analysis of empirical data on the main classification characteristics allowed identifying the stable trends in the changes in the Internet audience and their preferences. We found that Internet users often do not use news websites directly (35 per cent of the entire audience); most of all, they are interested in the most aggregated overview or a specific piece of news. Every year, the online media audience increasingly differentiates and becomes more diverse by sex, age, occupation and other characteristics. A significant number of Internet users consists of Russian residents at the age of 25 to 34 years (29 per cent). The elder generation has begun to use the Internet more often (21 per cent), while the other two age groups of the audience at the age of 12-17 years and 18-24 years are the smallest ones, accounting for 10 per cent and 14 per cent respectively. The main companies that significantly affect the public mood in the country are Yandex and Mail.ru; they control over 75 per cent of the market. The article provides an assessment of consumers' readiness to perceive the online media as the main and only source of information.

Keywords: Mass media, social portrait, Internet audience

The need to study different types of audience, their information needs and interests is caused by the development of media in new formats. Currently, one of the most interesting phenomena is the transition of print media from their traditional method of distribution to the electronic one via the Internet. Urri (2012) notes that the Internet has become a new form of transition of a modern person, constantly moving from one community to another. This, in turn, leads to the rapid development of social networks, a significant part of which are electronic media groups. There are both strong and weak social ties between the participants in the communities (Bergenholtz, 2012; Kavanaugh et al., 2003). If strong social networks are small circles of communication with relatives, work colleagues and friends, the weak ones represent a number of users whom a community member is not personally acquainted with, but they are united by a common interest, and therefore a person is inclined to “copy” the behavior and opinions of the whole community. This position is widely supported; undoubtedly, communities in social networks (social media) have a serious impact on the processes, happening in the society (Alshahrani & Ward, 2014; Antunes & Costa, 2015).

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When studying the audience as a set of consumers, their social and demographic characteristics and consumer behavior are taken into account – a social portrait is formed. The social portrait of the audience is the totality of the people's qualities in the selection, their integrated personality traits that are inherent in the whole totality. The behavior of a wide range of readers is characterized by certain motivations, it often depends on the surrounding socio-economic and political situation. Despite the fact that the Internet audience increasingly differentiates every year and becomes more diverse (Vesniæ-Alujeviæ et al., 2018) in terms of sex, age, occupation and other characteristics, the characteristic motives and methods of their adaptation can be singled out and used in journalism.

Due to the fact that the popularity of Internet publications is rapidly growing, the social portrait of the Internet media audience has changed dramatically in recent years. A clear definition of its address line is a fundamental factor for the mass media in the organization of its activities. It involves the consideration of such parameters as the frequency of updating information, the nature of the transmitted information, the areas of information focus, the volumes and formats of materials, as well as the language of communication with its audience and the conditions for its access to the content. The question of what the audience needs is often left without a clear answer; sometimes the editor of the publication loses touch with the reader's mood (Zasurskii, 1988). At the same time, the definition of the publication's address and its auditor characteristics is the starting point for forming the concept and information policy of any media. These and other features emphasize the practical importance of this study.

The purpose of the work is to compile a social portrait of online media audience in Russia for 2008-2018, based on the analysis of the empirical data. This predetermines the research tasks, which include the study of methods and approaches to the formation of a social portrait of the media audience; analysis of the dynamics of the Internet audience and its composition; study of readers and popularity of the main online media in Russia; identification of preferences and main trends in the development of online publications. In accordance with the goal, the object of the study is the online media audience, and the subject of the research is the social portrait of online media audience.

Literature Review

Theoretical approaches to the study of the relationship between the media and its audience have been transformed at the same time as the society develops. Chronologically, the development dynamics of the theoretical approaches can be represented in the form of some concepts: the concept of unlimited media influence on the audience– the potential for media influence on the audience is unlimited, while media images are perceived uncritically by people (Lippmann, 2004; Semenova & Korsunskaya, 2010; Fiske, 2011; Lasswell, 1960; Braddock, 1958); the concept of media's indirect influence on the audience– the influence of media on the audience depends on the reference groups and the socio-demographic characteristics of a person, while the study of mass media's role is quite problematic (Hovland et al., 1953; Klapper, 1960; Lazarsfeld & Katz, 1955); and the concept of the media and audience's mutual influence– defines only the vector of discussion of the event, and not the interpretations themselves (Champagne, 1997). That is why the ways of mutual influence of the media and society are so diverse.

The active development of mass media, including the appearance of online publications, has caused the emergence of the mass audience phenomenon (Zhebit, 2012). Mass audience is characterized by non-uniformity, dispersal, heterogeneity and most often anonymity (Zhukova, 2008). In sociology, the individuals who form this audience are viewed

as individuals included in the network of real social relations and connections. Castels (2004) calls such a society “a network society”: the Internet today is not just a communication medium, but, in fact, the organizational structure of the modern information society. Social networks are most consistent with the proposed model of social communication. It reflects an entirely different level of media research, involving the mutual influence of the audience and the communicator (McQuail, 2013).

Due to mass communication, the audience can establish and maintain relationships and connections not only within their social group, but also with a wider social environment. The creators of products intended for mass audience tend to take into account the characteristics of the audience.

In the scientific literature, the concept of the audience is often understood as a synonym for the definition of the public (Mironenko, 2011). Traditionally, the public is understood as a large group of people with common significant properties and characteristics. At the same time, the concept of the audience reflects more dynamic and volatile processes, because the unifying feature of people in the audience is the presence of similar needs, more often it is information needs (Urbanaeva, 2017). An audience means people who are directly involved in the process of perceiving information and come into contact with a source of information (Radkevich, 2009).

There is a quite common approach in journalism to analyzing situations and events associated with socio-political processes, and, consequently, with the influence of the media on the daily lives of people (Semenova & Korsunskaya, 2010). In this case, mass communication is understood as a socially conditioned phenomenon, the main function of which is to influence the audience through the content of the transmitted information. Particular attention to trends concerning the change in the behavior of online media audience is given in the publications of Webster and Lin (2002). The authors state that users cease to be third-party observers and begin to take an active part in the discussion of news events. In this regard, the strategies of many online media should be changed and adapted to the demands.

Moreover, the difference in the delivered information, depending on the target audience of specific media, was also revealed. So, mass media, oriented to elite groups of society, try to “uncover” the concealed questions, thus demonstrating access and control over virtually any information, attracting their audience by exclusive information. The media, oriented to a mass audience, on the contrary, are interested in transmitting typical judgments (Noelle-Neumann, 1996).

In the article, written by Sadylo (2015), an empirical study was conducted, based on comments on the website of an online channel. Based on the analysis, a spiral of silence is developed; the audience of the channel is divided into several groups, depending on the attitude to the opinion expressed in the news event and comments to it. Some of the shortcomings of his approach should be disregarded, given that the selection is small and does not have sufficient statistical significance; the revealed peculiarities are characteristic of only regional media of small cities.

Qualitative analysis of the audience of the online media is presented by Osagie (2009) and Lindlof (2009), which reveal the main characteristics of the audience and the variability of their preferences over time. A separate issue in this question is the usefulness of user feedback. So, based on the advertisement messages’ example, Aldakusheva (2010) found that the low efficiency of their placement is determined by the discrepancy between the target audience of the advertiser and the audience. Once again, this emphasizes the relevance of researching the social portrait of online media audience.

The main trends in the online media development are described in a research conducted by Meulemann and Hagenah (2009). The article contains content analysis and user survey. These methods are effective, but given the goal of creating a social portrait of the audience, it is optimal to use selections of a larger scale.

In her work, Mashninova (2011) touches upon the aspects of online users' activity, professional training of the audience, the scope of activities, and the regularity of actions on the Internet. Arzhenovskii and Suntura (2014) conducted a statistical analysis of online services consumers' profiles in Russia: data from 2005-2015 are summarized, the age structure of the audience and its gender characteristics are described. In addition, the authors considered in detail the differentiation of online users by the level of their education and occupation. The methods of their investigation are indicative and will be useful for our research. Moreover, Pashutin (2010) conducts stratification of the television audience as an adjoint group of media users. Livingstone (2005; 2003) divides news readers into active ones and passive ones, explores the perception of information by the audience and compiles models of communication processes between the media and consumers on the Internet.

Thus, we can confidently state that the topic of the modern social portrait of online media audience requires more detailed analysis, given the variety of methodological approaches to research. In the context of the rapid development of the Internet, social networks and interactive forms of communication, an important issue is the continuous information update, since the social portrait of media's target audience is highly variable.

Materials and Methods

The conducted review of literature allowed identifying the authors' approach to describing the social portrait of online media audience based on the empirical data. Previously, the classical research methods of the readership were the analysis of book sales' volumes, circulation of publications and readers' forms in libraries, surveys of library readers, as well as mail and press inquiries of readers of newspapers and magazines. Now-a-days, the methods of observation, questioning and generalization allow identifying the main characteristics of the behavior of modern readers of online publications.

The basis of the empirical data was the statistics of the WEB-Index project, developed by the consulting company Mediascope (2018). The project keeps track of user behavior since 2007 and provides detailed information about the volume, profile and other characteristics of the online audience in Russia.

The study represents the population of Russia in all cities that appeared in a random selection, at the age of 12-64. The information for the Web-Index project is collected within the panel of participants – a group of survey respondents. Identification of the Internet use by the participants in the study is done using a special counter put on the estimated websites. For sites, where the counter is not put, the data is collected using special software installed on users' computers or mobile devices. At the moment, the project involves over 20 thousand people, the size of the mobile panel is about 5 thousand people. The main direction of the analysis will be the identification of trends and the definition of patterns. Stratification of Internet users into groups will be performed according to the following indicators: gender; age; employment; sphere of activity.

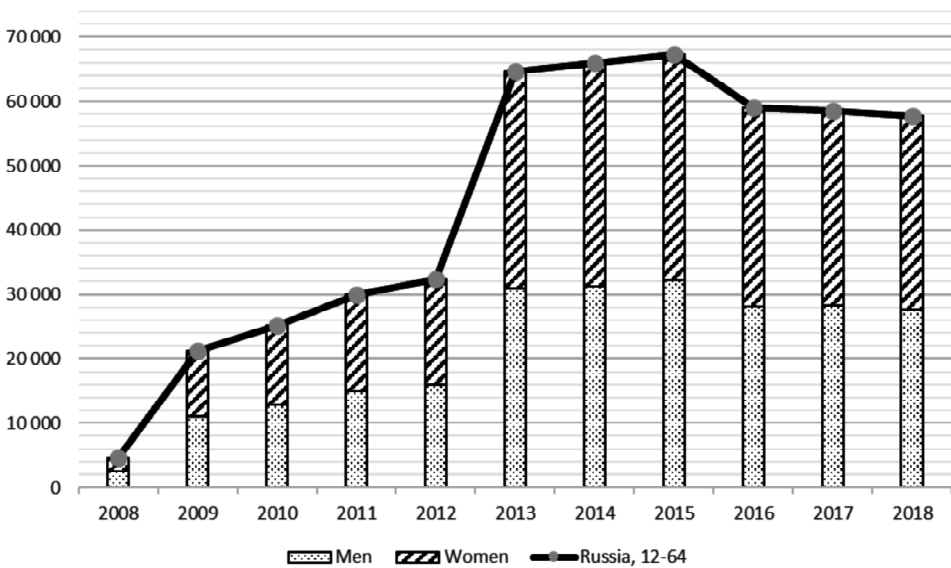
The study period is defined as 2008-2018. This is done for several reasons: firstly, to formulate conclusions based on analysis, it is required to have a study period of at least ten years; secondly, until 2008 the Internet did not have such a wide coverage in Russia among the population and the mass media were limitedly represented there as online

media. In our study, we will use the method of comparative analysis of indicators with a graphic interpretation of empirical data, which will most fully reflect changes in the online media audience and make a modern social portrait.

Results and Discussion

Internet Activity

First of all, when studying online media, great importance should be placed on the analysis of the audience as a whole. The target audience of any online publication is people who use the Internet. In addition, the more regular a person uses the Internet, the more likely he or she will use online media. Online media readers are often social networks' users. Thus, the online media audience is represented by a large number of people – those who purposely go to online media websites, and those who are subscribed to various news channels and magazines in social networks. This particular feature makes necessary the analysis of the online audience as a whole. The data on the number of people using the Internet during the examined period, as well as their division by sex, are presented in Figure 1.



Source: Mediascope 2018

Figure 1. Dynamics of the Internet audience in Russia for 2008-2018, thousand people

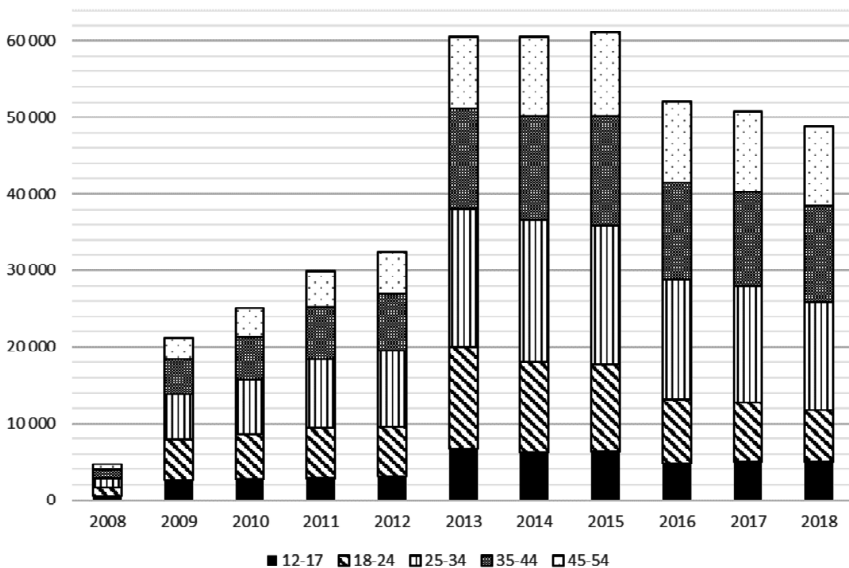
Studying the dynamics of Internet users, three significant periods should be noted: firstly, in 2009, the Internet audience increased by over 4.5 times. This leap is due to the fact that at that time in Russia the wireless network became more accessible. The Internet began to be actively used in work, information search, communications and as a means of

information transfer; secondly, the next sharp rise was in 2013. At this time, the Internet began to appear at every house, the worldwide network began to be used not only to facilitate work duties and business communications, but also for entertainment. Presumably, 2013 witnessed a turning point for the online media, after which they began to develop widely; thirdly, in 2016, the number of Internet audience declined. A possible reason for that was the trend of abandoning the stationary Internet in favor of the mobile one. Until 2018, the number of users has been relatively stable and it continues to decline at a low pace.

The presented data allows drawing a conclusion that the Internet has overcome the peak of its development. The audience is no longer ready to consume everything that is offered to it, having become more selective. Thus, it provides for the urgency of studying online media audience and revising the content of the strategy, as well as finding new ways of interacting with the reader (Kunz & Werning, 2013; Faustino, 2013).

Figure 1 represents the analysis of the ratio of men and women among the online audience. It should be noted that in 2008, the network users were mostly men. It is also important to highlight the prevalence of men in the audience until 2012 – at the time when the Internet was used mainly for work. Since 2013, one may observe the feminization of the audience (Fisher & Craig, 2000), an increase in the proportion of housewives among users and other factors. The increase in the number of women in the audience can be related to the beginning of the Internet use for entertainment. At the moment, women (52 per cent) use the Internet more often than men (48 per cent).

The differentiation of users by age plays a major role in forming the social portrait of online media audience. Figure 2 shows the dynamics of the five age groups in the period from 2008 to 2018.



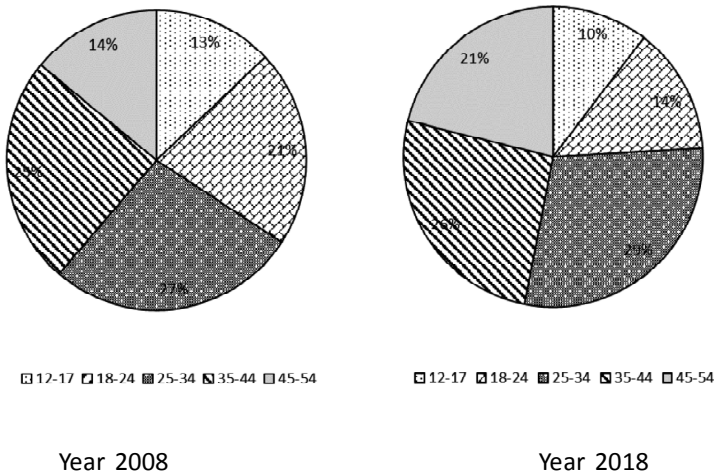
Source: Mediascope, 2018

Figure 2. Age stratification of online audience in Russia, (thousand people)

When considering age stratification, it is interesting to observe the change in the composition of the audience, depending on the periods of Internet spread in Russia. In 2008, over 50 per cent of the coverage consisted of 25-44 years old people. A large proportion of these groups is maintained throughout the period until 2013. From 2009 to 2012, the percentage of groups aged between 25 and 34 and from 45 to 54 years is noticeably increasing. The growth is due to the increasing use of the Internet in the workplace. After a sharp increase in the online audience, the ratio of groups changed – the proportion of elderly people increased to 16.7 per cent, while the share of employees decreased. This is the main characteristics of the period when the Internet began to be used in everyday life. For a more detailed analysis of the change in the age division of the online audience, Figure 3 is compiled; it shows the specific composition of the audience in 2008 and in 2018.

In the last ten years, the share of the teenage audience in the total number decreased from 13 per cent to 10 per cent. A more significant decrease was represented by a young audience – from 18 to 24 years – its rate fell from 21 per cent to 14 per cent. The next two groups, covering the population of the country from 25 to 44 years, showed a slight increase by several per cent– to 29 per cent and 26 per cent, respectively. The following fact is interesting: from 2008 to 2018, the share of the elder population (from 44 to 54 years) increased from 14 per cent to 21 per cent. This phenomenon is partly justified by the fact that Internet users have moved to the following age groups. Despite this, one cannot overlook the fact that the structure of Internet users has significantly changed. The Internet ceases to be only a youth phenomenon. Currently, a large proportion of users are people from 25 to 54 years.

In 2018, a large proportion of online users continue to be Russian residents aged 25 to 34 years (29 per cent). The next largest group are people aged 35 to 44 (26 per cent). The two other groups– 12-17 years and 18-24 years – are the smallest ones, amounting to 10 per cent and 14 per cent, respectively. In this regard, the existing online media should change the strategy of compiling content, the style of presentation of the material and much more.



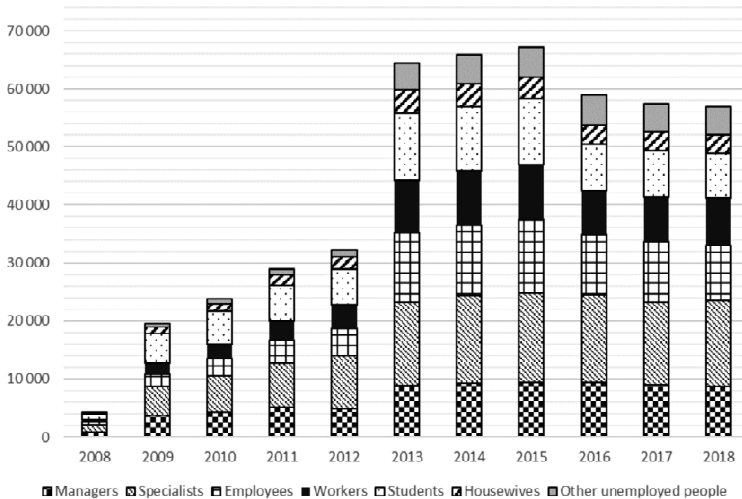
Source: Mediascope, 2018

Figure 3. Change in the age structure of the Russian online audience

The analysis of the men's and women's dynamics will permit to determine the social portrait of the online media audience. Considering men who use the Internet, the following trends should be highlighted: the share of men aged 18-24 years has sharply decreased – from 11.2 per cent in 2008 to 6 per cent in 2018; the growth was observed only in the elder generation's group – from 7.8 per cent to 8.2 per cent, respectively. The analysis of the female audience allows identifying similar trends: the proportion of women aged 18 to 24 has significantly dropped, from 10.2 per cent in 2008 to 5.6 per cent in 2018; women between the ages of 24 and 34 use the Internet almost as often – in 2008 the share was 12 per cent, in 2018 – 11.8 per cent, the same is true for women from 34 to 44 years – their share is at the level of 11.7-11.6 per cent throughout the period.

The research repeatedly traced the fact that in the first period of its spread across the country, the Internet was used for work purposes (over 70 per cent of Internet users have a job). Now this trend has changed. This is due not only to the fact that the Internet is an integral part of work, but it is also connected with the ratio of the employed and unemployed in society. Their analysis allows drawing certain conclusions: most often, the Internet is used from computers at work. In this regard, online media sites should look reserved, without intrusive advertising, so as not to attract the attention of colleagues, if a person is distracted and decided to read a news article, or looking for work information in a news publication.

It is also important to determine which sphere the modern online audience is interested in, what topics are of interest to online media visitors. To solve this problem, the following groups of users are examined by type of their activity (Figure 4): managers, specialists, employees, workers, students, housewives and other unemployed people.



Source: Mediascope, 2018

Figure 4. Distribution of Internet audience in Russia by type of their activity, thousand people.

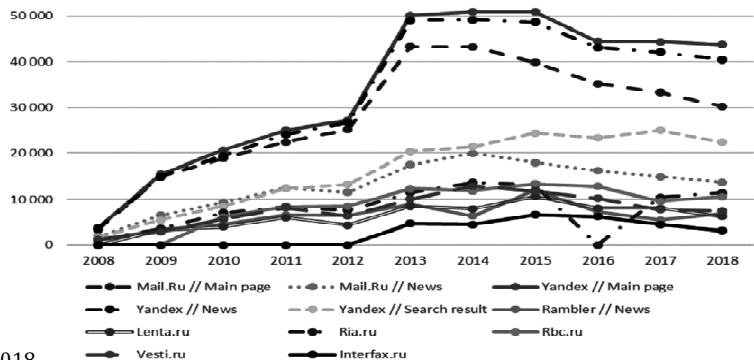
It was found that in 2008 the Internet was used mainly in offices: 32.3 per cent were specialists, 19.2 per cent managers, and 22.3 per cent students. The Internet has become not only a means of finding the necessary information (due to a large number of office workers and students), but also became a place for communication and leisure – this is shown by a significant differentiation of groups by 2018. A significant increase in non-working population among Internet users also proves that the Internet now exists not only for work and studies: from 3 per cent in 2008, the indicator rose to 8.3 per cent in 2018. In addition, this proves the fact that the Internet has become the main way to find work and, possibly, the method of mastering new professions (online training, etc.), performing not only office work but production tasks (the share of workers in the structure increased from 4.8 per cent in 2008 to 14 per cent in 2018). Such a sharp surge can be considered the formation of a new target audience of online media.

In 2018, 73 per cent of online audience consists of officially employed people, and 27 per cent unemployed ones. However, it should be taken into account that at the moment there is a growing number of freelancers, who are often not officially employed, but the Internet is extremely important to them. It is also necessary to take into account the ratio of employed and unemployed people throughout the country. However, it can be stated that the majority of the online media audience consists of working people who come to relevant online sites mainly during working hours and prefer a certain style of website design.

Trends of Online Media Development

To achieve the stated goal of the research, it is considered necessary to assess the preferences of the online media audience. This will allow analyzing the empirical information on the number of visitors on the main news portals during the examined time period (Figure 5). Popular online media in Russia can be divided into several groups: news aggregators, where the reader does not go on purpose (the main pages of Internet search engines); political editions; business journals; news commentators; and publications that have content other than news.

The initial assumption about the impact of Internet development on the dynamics of the online media audience can be clearly seen in Figure 5. Until 2013, there had been a rapid and steady growth of the audience, the publications developed, the population learned about the possibilities of the worldwide network. After 2013, the dynamics of the Internet audience coincides with the dynamics of online media sites’ visitors, but it is interesting to note that at the sites like Yandex and Mail.ru the growth rate was lower than at other news sites. That is, the new audience that appeared was more interested in other ways of obtaining information.



Source: Mediascope, 2018

Figure 5. Dynamics of the main online media audience in Russia, thousand people

The analysis of the data allowed establishing that the number of online media audience is growing rapidly (not counting the last three years). However, these data are not representative in determining the popularity of online publications in Russia. To establish how many people use the Internet as mass media, it is necessary to determine the share of online audience in the Russian population, the proportion of the online media audience in the Russian population and in the number of Internet users (Table 1).

Table 3. Ratio of Internet audience and online media audience to the population of Russia, 2008-2018

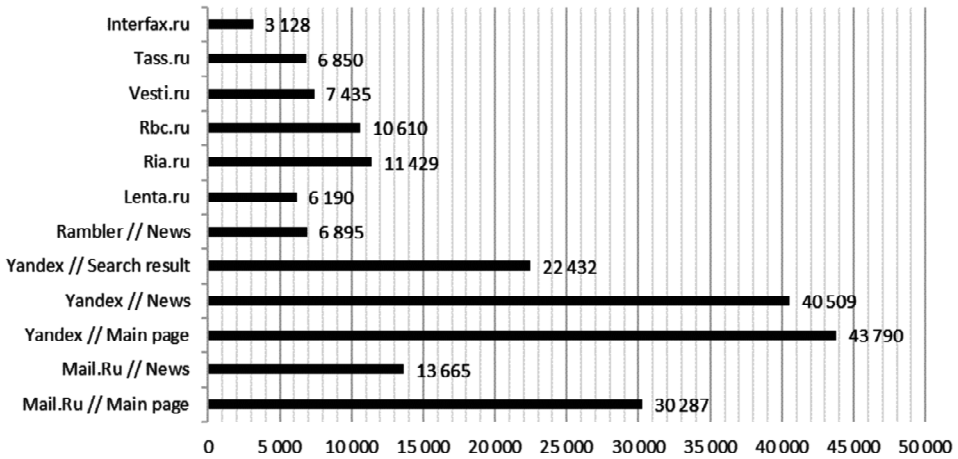
Indicator	2008	2010	2012	2014	2016	2018
Online audience (thousand people)	4,619	25,090	32,434	65,879	59,100	57,726
Online media audience (thousand people)	17.8	104.1	137.0	247.3	214.8	203.2
Population of Russia (thousand people)	142,800	142,900	143,000	143,700	146,500	146,900
Share of Internet audience among the population of Russia	3%	18%	23%	46%	40%	39%
Share of online media audience among the population of Russia	1%	7%	10%	17%	15%	14%
Share of online media audience among Internet audience	39%	42%	42%	38%	36%	35%

Source: Mediascope, 2018

In 2008, the proportion of Internet users in Russia was only 3 per cent of the population. Over the past 10 years, there have been significant changes in 2013-2015, this share reached 46 per cent, and only in 2015 there was a significant decrease (in 2018, 39 per cent of the Russian population use the Internet). As for the online media audience in Russia, in 2008 it was about 1 per cent. With the growth in the number of Internet users and the online media development, as well as with the desire of readers to study alternative points of view, which differ from television and print media, in 2018, the indicator increased to 14 per cent (in 2015, a maximum level of 18 per cent was observed).

The relation of the online media audience to the Internet audience as a whole is of great importance. It should be noted that this indicator slightly changes over time – from 33 per cent in 2009 to 45 per cent in 2011. It can be concluded that the online media are always in the field of user's priority interests. This once again confirms that to compile a social portrait of the online media audience, the data as a whole should be analyzed.

When compiling a social portrait of the online media audience, it is important to examine popular media resources (Figure 6). At the moment, the online media audience by 53 per cent is covered by Yandex services – it is brief pieces of news near the search box, direct queries and news section. Internet users often do not use news sites directly, most of all they are interested in the most aggregated overview or a specific piece of news. 35 per cent of the people (including 20 per cent of Yandex and 15 per cent of Mail.ru) to the entire audience are not looking for news directly and do not go to news portals – they see information when they use search engines. Most of the online audience does not go specifically to online media sites.



Source: Mediascope, 2018

Figure 6. Popularity of the main online media in Russia in 2018

The main companies that can significantly affect the public mood in the country are Yandex and Mail.ru. They control over 75 per cent of the market. Significant shares are held by Rbc.ru (5 per cent) and Ria.ru (6 per cent). The audience that uses the online media and deliberately visits the sites to learn all the news, most of all trusts these sources. Their common features are the fact that on these sites there is not only news information, but also a large amount of business information, reviews and analytics.

Conclusion

Making a social portrait of online media audience on the basis of empirical data will permit to characterize the readers of online publications. Identifying the common qualities of people who prefer to use the Internet to search for news, informative texts and entertainment, one may significantly increase not only the audience, but also the “effectiveness” of the media’s work. This will make it possible to carefully select the content, taking into account the readers’ opinion. Let us denote the main conclusions regarding the social portrait of online media audience in Russia for 2008-2018.

In 2018, a significant proportion of Internet users continue to be Russian residents aged 25 to 34 years (29 per cent). The elderly generation has started to use the Internet more often (21 per cent), while the two other groups: 12-17 years and 18-24 years are the smallest ones, accounting for 10 per cent and 14 per cent respectively. There is a feminization of the Internet audience, the share of men aged 18 to 24 years dropped sharply from 11.2 per cent in 2008 to 6 per cent in 2018.

The online media audience prefers brief overviews of news to long articles (53 per cent of attention is occupied by Yandex services – this is brief news near the search box, direct queries and the news’ section). The users have become more selective in consuming content, Mail.ru and Yandex providers have significantly lower audience growth than the specialized magazines – Rbc.ru, Ria.ru, Lenta.ru and others. 35 per cent of the entire online media audience do not go to the sites on purpose, 22 per cent of readers are only interested in specific pieces of news, getting to the site of the source. In the near future, the online

media audience will increase in the framework of these categories. Groups within the audience will include more and more online media users. At the same time, the main task of the media is users' geolocation and their provision with personalized content. The study of social characteristics and the construction of typological models of the audience will allow the media to improve their activities taking into account the knowledge of the specifics of the consumer of information.

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