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Modern Russian media: current problems and development prospects

SUMMARY
This article analyses the current statistical data of the Russian media market. The review includes segments of printed media, television, radio broadcast and the Internet. Problems typical of the Russian media market have been highlighted. Attention is given to the changes in the business model of periodicals following the changes in the media legislation, as well as the deterioration of the macroeconomic situation. The author specifies the prospects for development of the Russian media.

KEYWORDS: Russian mass media, business model of publication, periodicals, television, radio broadcasting, Internet

Introduction

The Russian media market is currently undergoing the stage when it has to define the vector of its further development. This is largely due to the influence of the global media industry, which, according to the forecasts of some analysts, is at the threshold of new transformations. Besides, there is a need to rapidly react to internal challenges of economic and political nature.

One of the most significant problems of the world's media market is the fact that in many leading countries the media business model, which existed until recently, has been destroyed, but the new one has not been formed yet. Specialists increasingly emphasize this fact in their expert surveys. The New York Magazine has conducted one such questionnaire this year with 113 employees of printed, television and digital media participating. According to their opinions, "in their pursuit for higher ratings, journalists make an emphasis on entertaining and sensational content, with a strive to inflate conflict"[2]. They marked that in the media "prioritization of speed over accuracy, exteriority, phony adherence to objectivity, fear of

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1 Associate Professor; School of Journalism and Mass Communications, Saint Petersburg State University.
2 The Media on the Media. (2016, July 24). Retrieved August 02, 2016, from http://nymag.com/daily/intelligencer/2016/07/media-survey.html (In Boytsova A. New York Magazine Research: What Happens in the Media (2016, August 01). Retrieved August 10, 2016, from http://planetasmi.ru/zarubezhom/45591-issledovanie-new-york-magazine-chto-proiskhodit-v-media)

information sources, ignorance, prejudice, bias, frequent use of information from anonymous speakers and self-advertisement have increased"[3]. A serious indication that the respondents made was that the media lost people's trust: almost half of the respondents (49.6%) believe that it happened because the public discourse is politically polarized. There is an impression among the audience that the media serve the interests of politicians and business. As a result, journalism retains its entertaining functions, losing the traditional ones[4].

One of the current problems of a national scale, which the Russian media has faced lately, is the general economic decline. It is characterized by the depreciation of the ruble, decrease of revenues and the purchasing power of the audience, reduction of investments into the economy. The investment deficit has directly affected the media. The media, being economic enterprises, have an unstable position in the market, so, in order to avoid risks, investors are reluctant to invest into them[5].

The reasons listed, as well as many other factors, which are yet to be mentioned, were serious preconditions for the owners and creative staff of many media to reconsider the business models of their publishing houses, methods of work with the audience, and the content of mass media. At present some Russian mass media continue to look for an optimal form of activity in the current situation. Here we can provide a more detailed analysis of different sectors of the media market, reasons and possible outcomes of the current situation.

State of Russian media market: statistical data

Periodicals

According to the official statistics, as of the end of 2015, there were 58 628 printed media registered in Russia. Among them were 23 628 newspapers, 30,813 magazines. The remaining part of the rated printed periodicals consisted of collections (1,807), bulletins (1,430), anthologies (890), reference books (45), catalogues (15)[6]. To compare one can look at the key figures as of 31 December 2014. On that day the number of registered printed media summed up to 61,706, among them 25,613 newspapers, 31,683 magazines. The numbers indicate that yearly total amount of registered media decreased by more than three thousand. The number of newspapers decreased by almost two thousand; the number of magazines decreased by 870. The quantity indices of other regis-

[3] Ibidem.
[4] Ibidem.
[5] Federal Agency on Press and Mass Communications (FAPMC). (2016). *Russian periodicals. Status, Trends and Development Prospects. Report* (p. 5) Moscow. Retrieved July 4, 2016, from http://www.fapmc.ru/rospechat/activities/reports/2016/pechat.html.
[6] Federal Service for Supervision in the Sphere of Telecom, Information Technologies and Mass Communications (Roskomnadzor). (2016). *Public report 2015* (pp. 37-38). Moscow. Retrieved August 15, 2016, https://rkn.gov.ru/docs/docP_1485.pdf.

tered printed media are also decreasing. A similar decreasing flow can be traced back to 2012, excluding the figures for magazines and collections – the aforementioned trend for these types of media started from 2013 (detailed data is shown in Table 1).

Table 1. Number of registered printed media

Type of media / Year	**2012*** (as of 31.12.2012)	**2013**** (as of 01.01.2014)	**2014***** (as of 31.12.2014)	**2015****** (as of 31.12.2015)
Magazines	31 452	32 278	31 683	30 813
Newspapers	29 413	26 983	25 613	23 628
Collections	1 933	1 983	1 904	1 807
Bulletins	1 662	1 610	1 508	1 430
Anthologies	1 001	965	921	890
Reference books	99	68	57	45
Catalogues	36	27	20	15
Total number of media	65 596	63 869	61 706	58 628

* Federal Service for Supervision in the Sphere of Telecom, Information Technologies and Mass Communications (Roskomnadzor). (2013). *Public report 2012* (pp. 52-53). Moscow. Retrieved August 21, 2016, from https://rkn.gov.ru/docs/docP_962.pdf.
** Federal Service for Supervision in the Sphere of Telecom, Information Technologies and Mass Communications (Roskomnadzor). (2014). *Public report 2013* (pp. 45-46). Moscow. Retrieved August 17, 2016, from https://rkn.gov.ru/docs/docP_1154.pdf.
*** Federal Service for Supervision in the Sphere of Telecom, Information Technologies and Mass Communications (Roskomnadzor). (2015). *Public report 2014* (pp. 46-47). Moscow. Retrieved August 15, 2016, https://rkn.gov.ru/docs/doc_1240.pdf.
**** Federal Service for Supervision in the Sphere of Telecom, Information Technologies and Mass Communications (Roskomnadzor). (2016). *Public report 2015* (pp. 37-38). Moscow. Retrieved August 15, 2016, https://rkn.gov.ru/docs/docP_1485.pdf.
Source: public reports of the Federal Service for Supervision of Communications, Information Technology and Mass Media in 2013-2015.

The change in the number of registered mass media naturally indicates certain trends; however, it is not a direct reflection of the financial state of the media market and amounts of distributed press. It is acceptable that some media could be considered registered, but not published for some time; some newspapers and magazines could have fluctuations in circulation. The situation in which the number of titles of the media reduces while the circulation increases and the capitalization of the remaining media enterprises grows, is not rare in the world practice. Analysts get a fuller and more accurate model of the market conditions based on the mass media circulation and budgets data. Facts published on the sites of government departments show that there is a downward flow for these figures as well, thus confirming the data on the decline of the mass media market in Russia. In 2015 the total print of periodicals decreased, as compared to 2012, by 960 million copies and amounted to 2.04 billion copies. The circulations were decreasing every year approximately by 300 million copies (Figure 1).

Figure 1. Circulation of periodicals in Russia (billions of copies)
Source: Industry report of the Federal Agency on Press and Mass Communications *Russian periodicals. Status, Trends and Development Prospects.* 2016[7].

The situation with the budgets of printed media is slightly different. During the same period of 2012-2015 obvious reduction by over 2 billion rubles occurred only in 2015. A balance remained in the previous years (e.g. in 2012 and 2013 the budget figures of the press industry were the same), or changes were less dramatic (in 2013-2014 the reduction did not exceed 1 billion rubles) (Figure 2).

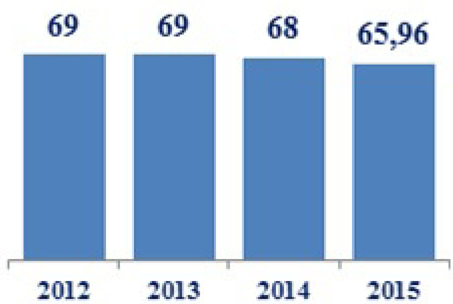

Figure 2. Total budget of press industry in the Russian Federation (billions of rubles)
Source: Industry report of the Federal Agency on Press and Mass Communications "*Russian periodicals. Status, Trends and Development Prospects*", 2016[8].

[7] Federal Agency on Press and Mass Communications (FAPMC). (2016). *Russian periodicals. Status, Trends and Development Prospects. Report* (p.4) Moscow. Retrieved July 4, 2016, from http://www.fapmc.ru/rospechat/activities/reports/2016/pechat.html.
[8] Ibidem.

Television and radio broadcast

The figures that reflect the change in the number of TV channels are slightly different from the figures in the press market. An increase in figures is obvious here: 2 956 TV channels were registered in Russia in 2015 (as of 31.12.2015), which is by 170 more compared to 2014 and by 488 more compared to 2013. The number of radio channels is also increasing (2816 in 2013, 3182 in 2014, 3408 in 2015). The comparison with the number of registered active licenses for TV broadcast similarly shows a positive trend: in 2013 there were 6644 such licenses, 6852 in 2014 and 6896 in 2015. This situation can be partly explained by the government program for TV broadcast development, including digital TV and radio, as well as more considerable investments in this branch of the media industry. Generalized data of this statistics are given in Table 2.

Table 2. Number of registered digital media and licenses*

Type of media, license / Year	**2013** (as of 01.01.2014)	**2014** (as of 31.12.2014)	**2015** (as of 31.12.2015)
TV channel	2 468	2 786	2 956
Radio channel	2 816	3 182	3 408
Registered active licenses for TV broadcast	6 644	6 862	6 896

* the table does not include data on the number of registered digital media in terms of some positions that are traditionally included in public reports of the Federal Service for Supervision of Communications, Information Technology and Mass Media, e.g. "TV program", "video program", "newsreel program", "radio program", "audio program", "electronic periodical program", "web publishing"
Source: Public reports of the Federal Service for Supervision of Communications, Information Technology and Mass Media in 2013-2015.

Russian TV channels can be divided into air and off-air channels by the mode of broadcast. Air channels are usually federal channels that have air frequencies and are broadcasted across the territory of all the country, or most part of it. Off-air are cable and satellite TV. The Russian Association of Communication Agencies (AKAP-RACA) has recently proposed to use the following terms: "main" instead of "air" and "niche" instead of "off-air"[9].

The group of federal air or main TV channels undoubtedly has a wider reach. This sector gets a special attention from the government while shaping policies in the field of TV development. It also became a priority for private business which invests into the development of the TV industry. A considerable stimulus for further

[9] Federal Agency on Press and Mass Communications (FAPMC). (2016). *Television in Russia in 2015. Status, Trends and Development Prospects.* Report (p. 73). Moscow. Retrieved August 4, 2016, from http://www.fapmc.ru/rospechat/activities/reports/2016/television-in-russia.html.

development of main federal channels is their inclusion into the list of multiplexes within the strategy of digital TV development. The first multiplex, which got the official name PTPC (Russian Television and Radio Broadcasting Network)-1, includes the following channels: *Channel One, Russia 1, Match TV, NTV, 5 Channel, Rossiya Kultura, Russia 24, Carousel, OTR, TVC*[10].

The second multiplex (RTRS-2) includes *Ren TV, Spas, STS, Domashniy, TV 3, Pyatnitsa, Zvezda, Mir, TNT, Muz TV*[11]. Federal channels which were not included in the multiplexes are: *Che, Euronews-Russia, 2x2, Disney Channel, Yu, RBK*.

Changes in the development of regional TV channels in the future might be related to the formation of a third multiplex. The multiplex concept has not been finalized yet, however there are forecasts according to which it could include seven or eight federal channels that did not get included in the other multiplexes, as well as one or two regional channels.

Depending on the founder, TV channels in Russia are divided into state-owned and non-state-owned. Among the state-owned are channels that are included in the BGTRK holding – *Russia 1, Rossiya Kultura, Russia 24*. The state also controls Channel One (the government share amounts to 51%) and a number of other broadcasters: the co-founders of the Carousel channel are *OAO Channel One, VGTRK, ZAO Karusel', TVC* channel belongs to the Moscow City government (99.3%) and ZAO Promtorgcentre (0.7%). Some non-state-owned TV channels that can be mentioned are *RBK* (founder: RosBusinessConsulting), Yu (YuTV Russia Holding), Domashniy (STS Media), and others.

The development of non-air (or, by other classification, "niche", thematic, cable-satellite) TV Channels show a positive flow. In 2015 their share reached 14% of the total amount of national audience (which means it almost doubled in five years)[12]. This level is considerable enough for investors and key players of the media market to get interested.

The radio market is undergoing similar trends. During the last several years in Russia the number of registered radio channels has been increasing (in 2013 their number totaled 2 816, in 2014 – 3 182, in 2015 – 3 408). As with television, VGTRK

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[10] The package of digital television RTRS-1 corresponds to the Decrees by the President of Russian Federation on the mandatory nationwide public television channels: № 715 (June 24, 2009), № 456 (April 17, 2012), № 167 (April 24, 2013), № 365 (July 15, 2015) // TV channels in RTRS-1 package. Russian Television and Radio Broadcasting Network. Retrieved August 26, 2016, from http://rtrs.ru/dtv/partnership_rtrs_1.

[11] TThe digital TV package RTRS-2 was formed in accordance with the decisions by the Federal Competition Commission on Broadcasting (December 14, 2012; December 18, 2013; September 30, 2015)// TV channels in RTRS-2 package. Russian Television and Radio Broadcasting Network. Retrieved August 26, 2016, from http://rtrs.ru/dtv/partnership_rtrs_2.

[12] Federal Agency on Press and Mass Communications (FAPMC). (2016). *Television in Russia in 2015. Status, Trends and Development Prospects. Report* (p. 18). Moscow. Retrieved August 4, 2016, from http://www.fapmc.ru/rospechat/activities/reports/2016/television-in-russia.html.

remains the main state radio broadcaster, including stations *Radio Rossii, Mayak, Radio Rossii Cultura, Vesti FM*. In total there were 9 holding companies of a national level in 2015 which owned 38 radio stations[13].

Despite the difficult economic situation, Russian broadcasters continue their international projects and radio broadcast for foreign audiences. Most of these broadcasters are musical radio stations. Their main coverage areas are neighboring countries, such as Kazakhstan, Ukraine, Belorussia, Moldavia, Tajikistan, Latvia, Estonia, Lithuania and other states. Retro FM had the biggest number of foreign broadcasting spots among musical radio stations in 2015 (63). The broadcasting network of this radio station is concentrated in two countries: Kazakhstan (28 broadcasting spots) and Ukraine (25 broadcasting spots). Autoradio is another a leader in the number of broadcasting spots abroad, having 42 spots (35 in Ukrainian cities), Europa Plus has 32 spots (24 on the Ukrainian territory), Love Radio has 13 spots (11 in Kazakhstan)[14].

Internet

The audience with internet access keeps expanding. In 2015 the number of users of the Russian segment of the RuNet reached 80.5 million. This number is over 9% higher than last year's figures. The mobile internet audience is increasing rapidly; the growth here amounted to 12.5%. Using mobile devices is more common among young people, aged from 12 to 24, whereas the older audience uses stationary computers and notebooks to access the web.[15] The increase in the number of users is favored by a relatively low cost: on average, the cost of mobile internet for tablets is about 280 rubles per month, which includes a 4.5 GB package.

The audience growth leads to the development of corresponding domains. The .RU domain includes 5.04 million names and is one of the five world's largest domains. The .РФ domain has 900 thousand names and is a leader among domains that use national alphabet symbols[16].

The field of state services via the Internet, open data publication program and online government are also developing. In order to receive state services, users must register in the Unified Identification and Authentication System. In the beginning of 2016 24.5 million people were registered in it, only in February the increase was 1.1 million people. Payments made via the Unified Portal of State and Municipal Services sum up to millions of operations – 2.6 million payments were made in 2015[17].

[13] Federal Agency on Press and Mass Communications (FAPMC). (2016). *Radio Broadcasting in Russia in 2015. Status, Trends and Development Prospects. Report* (pp. 29, 33).Moscow. Retrieved July 4, 2016, from http://www.fapmc.ru/rospechat/activities/reports/2016/radio.html.

[14] Ibidem, p. 40.

[15] Federal Agency on Press and Mass Communications (FAPMC). (2016). *Internet in Russia in 2015. Status, Trends and Development Prospects. Report* (pp. 57-58). Moscow. Retrieved July 4, 2016, from http://www.fapmc.ru/rospechat/activities/reports/2016/inet.html.

[16] Ibidem, p. 30.

[17] Ibidem, p. 13.

Government departments publish open information at data.gov.ru, the open data portal of the Russian Federation.

Problems and prospects of media development

The data presented in the previous part of this article give a general impression of the development of printed Russian periodicals and the problems that face the publishing business. These problems require certain efforts from press publishers in order to save the publications on the market, increase their competitive ability, expand their audience, etc. We will indicate several directions which have recently become essential for media publishers and their employees.

One of them is ***adaptation to the new legislative requirements***. This issue had to be addressed mainly by media enterprises with a foreign capital share of more than 20%, which was prohibited by legislation amendments. Some of these media ceased their activities in Russia. Those that wished to continue their work in the country had to introduce changes in their ownership and correct their management systems. For example, owners of the RBK corporate group removed some divisions from their immediate subordination: the RBK-TV channel and BusinessPress publishing house (in a reverse situation they would continue to be controlled by Pragla Ltd, a Cyprus company, which is now prohibited by law). These efforts proved to be sufficient to retain their positions in the market. The *Vedomosti* newspaper had to change their owner, with D.B. Kudryavtsev, former CEO of *Kommersant* PH, becoming the new owner. He redeemed the shares which were previously owned by different foreign companies: Finnish Sanoma, American Dow Jones & Co, British FT Group.

It resulted in a formal transfer of Russian holdings to Russian owners. This repeats the events in some Eastern European countries, where local financial structures are redeeming their control over media enterprises. Such processes of reorientation of media to local capital are characteristic, for instance, of the Czech Republic. As an outcome of such transformations, new conditions, which appear in the media market, reflect the interests of national business and political elites[18].

In the television market, the Russian legislature mitigated the restrictions for subscription channels, mostly cable and satellite, that were not allowed to place advertisements in 2014. In February 2015 they got this permission back on conditions that they distribute 75 or more percent of national production[19].

Search for new business models for media enterprises is another trend on the market. An array of factors, related to the new political and economic reality, as

[18] Ibidem, p. 26.

[19] Federal Service for Supervision in the Sphere of Telecom, Information Technologies and Mass Communications (Roskomnadzor). (2016). *Public report 2015* (pp. 16, 56). Moscow. Retrieved August 15, 2016, https://rkn.gov.ru/docs/docP_1485.pdf.

well as technology development and information technologies force media owners to search for new approaches to media business. The reaction of the market to the changes of political nature in legislation has already been analyzed; we shall draw attention to some other prerequisites of publications' business model transformations.

Among these are, for example, changes in the culture of consumption of traditional printed media. In the age of digitalization and establishment of new platforms of information distribution the consumer is not tied to just the paper version, but can receive the journalists' material by alternative means (phone, tablet etc.) in an electronic format.

The attitude towards the perception of the media production changes, too. Before, the consumer visualized media as the product of a TV studio, or a printed version of a newspaper, magazine, etc. At present the audience sees an informational product which is produced by some media company (or editorial office) and is distributed via different platforms. The traditional approaches towards media classification are also changing. Such classifications as the type of distribution and means of media production are gradually becoming irrelevant. The media brands and staff that produce the content are beginning to prevail. The multimedia mode of work and distribution of information on different platforms is becoming a routine, and, obviously, its significance will be minimized when the publication gets categorized. In this regard, one can forecast the increasing value of high-quality content in media business strategies.

Reduction of advertising budgets became a serious problem for the media market, especially for the TV and radio broadcast press sector. According to the data of the Russian Association of Communication Agencies (RACA), in 2015 the media advertising market lost about 10% as compared to the previous year; its volume was over 307 billion rubles. During this year, the advertisement inflow decreased by 29% in printed media, 16% in radio and up to 14% on TV. And only the Internet sector showed no noticeable decline: it is steadily winning positions and attracting new advertisers[20]. The advertising share in the total media budget remains rather high: the radio advertising income reaches approximately 60%.

The use of content-generating robots to produce texts is another unusual area of media industry development at present. For example, *Associated Press* uses a robot to highlight sports events, baseball games, in particular. This information appeared only recently, and, based on the experience of the above media, a special program algorithm and information from the Major League Baseball Advanced Media (MLBAM) portal are used to generate texts. Journalists continue to double-

[20] Federal Agency on Press and Mass Communications (FAPMC). (2016). *Television in Russia in 2015. Status, Trends and Development Prospects. Report.* (pp. 72-73). Moscow. Retrieved August 4, 2016, from http://www.fapmc.ru/rospechat/activities/reports/2016/television-in-russia.html.

check these texts before publishing, in order to edit them in accordance with the standards of the company. Earlier, since 2015, AP has used a robot to write texts on economic issues: over 3500 articles on the quarterly financial reports of companies are published every quarter[21]. Still earlier, in 2012, *Forbes* magazine and *Narrative Science* service concluded an agreement to provide automatically generated news on corporate reports for the forbes.com website[22]. In Russia, *Yandex* started using these technologies. Since October 2015 the company announced the launch of an information agency in which the messages are prepared not by journalists but by special generating programs “based on data monitoring and analysis”.

Conclusion

Economic and political factors have a decisive effect on the current state of the Russian media market. As mentioned above, economic difficulties arise due to negative processes in the macroeconomic situation of the whole country, scarce investments into the media industry, decline of advertising indices. Lack of uniformity has remained a negative factor which substantially influences the development of the media market. This peculiarity, which was pointed out by researchers several years ago, has continued to be significant until now. The uneven economic growth of the capital and the regions and centripetal trends in business operations impact media activities. The interest of political elites in economically successful media enterprises, especially in the regions, is another important factor[23].

The political leverage is implemented by legislation amendments and the use of different restrictions by controlling authorities. The most illustrative examples of recent times are the amendments, which limited the share of foreign companies in Russian media down to 20%, and Roskomnadzor tightening the control of the breaches in statutory regulations that limit the extremist and terrorist activites, etc.

We might suggest a growth in the role of the audience as the determining factor in the development of mass media upon the alignment of the market situation. It does not just mean that mass media will become more dependent on the audience’s interests. One should pay attention to the fact that many segments of the audience remain uncovered by the media. In the event of economic upturn and change of political priorities, mass media can be expected to develop in a number of directions. One of them is the young audience segment, which is presently narrowing for tra-

[21] A. Kuznetsov, Associated Press caught the robot to write sports news (2016, July 4). Retrieved August 21, 2016, from http://www.rbc.ru/technology_and_media/04/07/2016/577a264d9a794738a8714825.

[22] Federal Agency on Press and Mass Communications (FAPMC). (2016). *Russian periodicals. Status, Trends and Development Prospects. Report* (p. 27). Moscow. Retrieved July 4, 2016, from http://www.fapmc.ru/rospechat/activities/reports/2016/pechat.html.

[23] E.L. Vartanova (Ed.). (2013), *Encyclopedia of World Media Industry* (p. 266). Moscow: Aspect Press.

ditional media. Young Russians are noticed to gradually reduce the time they spend watching TV programs. They prefer to consume television content using other data distribution platforms (this situation, among other things, can lead to a reallocation of advertising budgets). This is happening despite the recent growth of the television audience in Russia. A similar situation is observed with the young audience of the radio, which generally remains in demand. This can be confirmed by the results of surveying: 64% of the population listens to the radio approximately once a day, 89% listen once a week, the daily average time of radio listening comprises 252 minutes[24]. The audience of the regional media, who keep a good development potential, remains underestimated. The audience of corporate media could receive more attention. However, at present work with them lacks consistency[25].

The further development of the Russian media market can be seen within the framework of the world media industry trends. However, one should take into account national peculiarities, which are defined by the state policy in the media field and traditions in the development of Russian journalism.

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