



DOI: 10.22363/2313-2272-2021-21-1-169-180

## Three questions to start the sociological study of heroism\*

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**Abstract.** Despite the understandable and predictable lack of sociological interest in the issues related to heroism, the search for clear and unambiguous conceptual and empirical definitions of the hero in the contemporary society seems to be a relevant sociological task, especially under the current pandemic which made the criteria of heroism interesting for the wider public. The authors briefly outline the main aspects of the traditional scientific interpretations of heroism as presented in the social-cultural narratives worldwide, and proceed to the issues that constitute the field of the sociological studies on heroism. The first research question is not so much a single definition of the hero as types of heroes based on social representations of when and how heroes ‘reveal’ themselves in decisions and actions. The authors rely on the traditional typologies of heroes usually based on the psychological aspects of heroic thinking and behavior to suggest a sociologically relevant typology based on both literature and the Russian public opinion polls. This typology implies answers to the questions of why the society needs heroes and what makes someone a hero in the eyes of the society, and allows to better understand and to more precisely define the false/pseudo/anti-heroism. The second research question is about the sources of images and understanding of heroism, which focuses on the mass media and especially cinema’s potential to represent certain social practices as heroic and to construct heroic images. The third research question is about the possibilities of the empirical sociological study of the types of heroes and their representation in the media (cinema). The authors argue that sociology should use its own methods (in a combination with techniques for studying the audience’s perception of movies) — content analysis and surveys, especially the unfinished sentences technique, and provide some examples of how this can be done, for instance, to compare the social representations of a ‘real hero’ and a ‘movie hero’ among different age groups and generations. The authors conclude with mentioning a new issue associated with heroism, which became evident under the pandemic — changes in the social representations of heroism determined by heroization of healthcare workers due to their selfless fight against the coronavirus epidemic.

**Key words:** hero; types of heroism; definition of the hero; false hero; mass media; cinema; sociological methods; empirical study; survey

Heroism does not seem an important sociological issue, perhaps, due to its multiple and unclear definitions not implying a certain set of empirical indicators. For instance, in the historical perspective, the concept ‘hero’ developed under the influence of myths, fairy tales and epics; therefore, in different parts of the world, there are analogies in sets of heroes, plot structure, psychological explanation of characters and actions of heroes. Campbell believes that heroic myths are based on two plots — creation of the world and formation of personality, i.e., there are either

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*The article was submitted on 01.11.2020. The article was accepted on 03.12.2020.*

cosmogonic myths or descriptions of initiation rituals of the hero: the latter explains the birth of the hero and his wanderings, primarily, his feats, accomplishments and death, which ultimately contribute to the creation of order out of chaos [8]. According to Campbell, all myths and legends present a similar life trajectory of the hero: after some ‘call’, he leaves his community, renounces his social role and norms accepted in his social circle; while on a journey, he faces various trials (almost always he has a patron, usually someone wise and elderly); after passing all the tests, the hero acquires some unique knowledge or item; as a result, the hero returns to his community and shares with people knowledge (item) which contributes to changing their lives for the better. Sometimes the spiritual component of heroism can be exaggerated, and the hero can be presented as a bearer of the spiritual energy of feat, self-sacrifice and new knowledge, as a personification of people’s connection, either conscious or unconscious, with some higher powers, which allows the hero to beneficially influence the development of society and to initiate changes in human thinking and consciousness [29].

Thus, the question is how sociologists can consider heroism if this social phenomenon is ambiguous due to too many definitions, features and connotations in both everyday life and interdisciplinary scientific discourse. The article presents an attempt to identify some basic directions of the sociological study of heroism, which seem to be relevant for the contemporary society given the evident trends of speaking about heroes.

First, instead of a hopeless search for a single definition of the hero, it seems more relevant to create a typology of heroes (heroic behavior and actions) based on social representations of when and how heroes ‘reveal’ themselves in social decisions and actions. There are many such typologies [see, e.g.: 17; 19] usually focusing on the psychological aspects of heroic thinking and behavior, so we developed a more sociologically relevant typology based on both literature and the data of the Russian public opinion polls [20]. For instance, the Russian youth (aged 14–22) identify the ‘hero-leader’ — a role model that inspires to leave the so-called ‘comfort zone’ in order to achieve goals in the future, someone unique and faithful to his mission, a tireless pioneer who found his calling, who is not afraid to take risks and lead his followers, who is active, compassionate, kind, and works for the good of others. When assessing the contribution of public figures to the historic past, Russians stress the significance of those who were the head of the state (in any official status) in different historic periods and despite their previous and current social estimates and images. Certainly, contemporary younger generations strongly differ from previous generations in their perception of ‘traditional’ Soviet heroes who are less significant for them, while more ‘ancient’ characters, on the contrary, seem to be of greater importance for the youth. Nevertheless, this is not some Russian specifics for social ideas about the ‘level’ of heroism of both real figures and fairy characters depend on the period of the youth’s socialization and education.

The suggested typology of heroism consists of military/war hero, rescue hero (in emergency situations), good-doer, inspirer, conqueror of one’s fear/feeling,

adventure-seeker, and demonstrative hero [38]. This typology implies answers to two key questions in the empirical study of heroism — why the society needs heroes and what makes someone a hero in the eyes of the society. And such answers would be more detailed and convincing than if, for instance, we preferred to identify only two types of heroism — ‘with a capital letter’ (heroism of the highest degree, when the hero faces a serious risk — of death, injury, imprisonment, etc., but still strives to help someone) and ‘with a small letter’ (everyday help to people, good deeds without harm and negative consequences for the hero) [14].

Moreover, the suggested typology allows to better understand and to more precisely define the phenomenon of false/pseudo-heroism, which seems to be crucially important since in everyday life heroism and its antonym are often substituted, and popular culture (fiction and cinema) often uses storylines based on a complex and dangerous search for ways to expose a false hero hiding behind one of many masks of real heroism — a warrior (steals someone’s feat and glory), savior (happens to be in the right place at the right time just by accident), inspirer (deceives his followers) or good-doer (hides criminal business behind a facade of good intentions). Thus, false heroism is the unjustified attribution of heroism, i.e., a false hero pretends to be a hero and is undeservedly considered a hero [25].

Within the suggested typology, we actually do not need to oppose the terms ‘hero’ and ‘false hero’, because the content and purpose of the actions of the adventure-seeker and the demonstrative hero seem to correspond to the essence of ‘false heroism’ not as a negatively connotated characteristic, but as a completely neutral term for defining inappropriate for the real hero strategies of behavior or actions. For instance, adventure-seekers choose adventures (and even desperate actions) as a way of life full of thrill and vivid emotions; while demonstrative heroes perform dangerous stunts for video filming (which is not their profession), participate in self-harm performances or imitate their idols to achieve fame and attract attention (often such ‘tricks’ end tragically). The difference between adventure-seekers and demonstrative heroes is that the former risk for an adrenaline rush and do not always make their hobbies public, while the latter risk their lives and health precisely to attract attention and in the future to monetize this dubious fame, i.e., today, demonstrative behavior can serve as a traditional ‘social lift’ in the financial perspective.

Certainly, sometimes it is difficult to distinguish between a demonstrative action and a real good intention, especially in the information society of mass culture, in which everybody constantly films everything that attracts one’s attention on mobile phones. Nevertheless, the adventure-seeker less fits the criteria of a false hero since he usually does not try to be perceived as a hero worthy of respect, admiration and copying. The rapid growth in the number of demonstrative heroes is the result of the widespread Internet, social networks and video hosting which became an essential attribute of our everyday life [see, e.g.: 2]. In particular, the YouTube has provided a huge number of people (everyone can use this opportunity) with a chance to become famous very quickly and with minimal financial costs, for

instance, with the video-formats like Primitive Technology and Followers Decide [41]: in the former, people prove their survival skills in the wild; in the latter, bloggers conduct a small survey of their channel's followers to identify the most unusual but feasible ideas, and then follow the instructions of their subscribers on camera to implement the assigned task. The popularity of both formats indicates that we like to watch how people demonstrate untypical and unnecessary strength and courage in everyday life after artificially placing themselves in an extreme situation, which is not a manifestation of real heroism but could have been such a manifestation under the real danger.

Undoubtedly, the types of false heroes are not limited to adventure-seekers or demonstrative heroes — good-doers and inspirers can turn into their opposites provided imitation, insincerity and show behavior. Thus, true good-doers are engaged in charity, philanthropy, different forms of social aid; while false good-doers just seem to be doing the same without a sincere desire to help those in need — their activities are ostentatious (they wear 'masks' of certain social roles [see, e.g.: 30]) and aim at self-promotion in social networks, at forming a deceiving positive image so that to increase their popularity [17]. Such behavior is typical — already in modern times, 'masks' became an element of socialization which structures social relationships and determines the course of social communication without the mediation of social institutions. And the only difference today is that the strength and intensity of the impact of 'masks' has increased due to digitalization of social life and to the 'iconic turn' — a social-cultural turn from the priority of the verbal to the dominance of the visual [see, e.g.: 32; 33].

Heroes-inspirers can turn out to be false provided a combination of imitation and manipulation. For instance, there are 'false prophets' in all historic periods, who proclaim deceiving values and call for risky actions, thus, exposing their followers to physical and psychological risks. Today, the power of such 'false prophets' to reach huge audiences has increased tremendously due to the Internet. Manifestations of false heroism among military and rescue heroes are also possible, but this is not so much a presentation of a falsified heroic image in the media as falsification of the very status of the hero (forgery of documents, distortion of facts, etc.) or a result of the radical change in public opinion (when yesterday's heroes turn into cruel aggressors). Undoubtedly, media mechanisms for constructing images of heroes and false heroes are the same since mass culture is based on a certain set of discourses and visual formats due to the transition/turn from the visible (focus on the object) to the visual (subjective perception of the visible), and then to the spectacular ('socialization' of visual practices as collective representations) [see., e.g.: 22].

Thereby, the second issue in the sociological study of heroism are sources of our images and understanding of the heroic in general and of its specific manifestations (types of heroism) in particular. Certainly, the most obvious object of sociological interest in this regard is the mass media and especially cinema — 'the art of phantoms' [9] — which makes us a part of those new realities and

experience (social worlds) that we might never face in real life. The possibilities offered by cinema are useful for sociology since it develops sociological imagination by an empathic presentation of historic and intercultural visual narratives which help us to understand the broader social context that structures our actions and choices. Cinema possesses such possibilities due to showing certain patterns and ideals and to generating new meanings and images. The task of movie analysis is quite hermeneutic for it involves interpretation of both subjective and objective messages [28].

The mass media pursue a policy of representation as consisting of social practices of constructing images from objective, subjective and interactive elements [see, e.g.: 36]. On the one hand, these images are used in the documentary to inform the public about the news and facts; on the other hand, the documentary is opposed to movies and commercial advertising which use other images for constructing an alternative semantic reality. The possibilities of the second type of the representation policy are used by social actors striving for fame with scandals and provocations, flash mobs and PR-actions, and expanding their influence with the electronic media and social networks, which ultimately blurs the boundaries between private and public life within ‘the society of the spectacle’ [11]. Therefore, constructed reality can no longer be distinguished from objective reality, representations become identities, and visual images as a tool of mass communication turn into their forms as shows and ‘spectacles’. New visual forms construct and legitimize new images with different means of symbolization and interpretation. For instance, to create the image of a national hero, the distinctive features of an individual are combined in a symbolic code universal for the social-cultural situation, so that viewers ‘recognize’ (decode) the ‘character’ as a unique personality; the final image is mobile and can turn almost any person into a hero (or deprive this status), and the media often construct the image of a ‘hero of the time’, while symbolically destroying the former ‘heroes’, since without some starting point (or standard for comparison) it is impossible to construct an image of the hero.

This image, like any other, is a complex and unstable structure, even though it tries to gain stability by simulating its unity with collective ideas and its correspondence to certain (‘iconic’) standards [3; 5]. The representation of the image as iconic binds together reality, image and ideology: the latter acts both as a product of influence on mass consciousness and as a general semantic context (a ‘filter’) that precedes perception and imposes restrictions on it, i.e., ideology makes people ‘see’ things what do not really exist or to ‘see’ things with distorted features. Thereby, it does not matter what the mass viewer really sees for the degree of influence of the demonstrated image on the mass consciousness and the stability of this iconic image in the collective perceptions of reality (public opinion) are more important. There are several steps in constructing ‘icons’ in the mass media [16]: 1) limiting the perception of reality with technological frameworks (camera lens or focus) — the part of reality that remains outside the framework loses its meaning for the viewer, i.e., subjective

perception is positioned as an objective assessment of reality; 2) fragmentation of a holistic image into interrelated elements that are edited and combined into a ‘collage’ to form a multi-faceted image of reality (effect of ‘multiple realities’ in music videos and commercials); 3) relief detailing of one object identified and shown in close-up after fragmentation; 4) metonymic transfer of the features of the selected fragment to the entire image, or projective replacement of the whole by its part as representing the entire image and accumulating its essential features; 5) adjusting the scale and focus on the detail not as a part of the whole, but as an autonomous independent unit (a ‘trademark’ of the hero).

Such a development of the image from ‘archetype’ through ‘stereotype’ to ‘logo’ is a feature of the symbolic exchange in the contemporary world of fetishized media images. Today, visualization technologies have become a standard tool for promoting sales and PR-strategies to create new ‘stars’ in music, cinema, politics and sports. In order to be used in the mass media as an ‘icon’, the image needs to have the following characteristics [6]: totality — ‘omnipresence’ in the public space; relevance — focus on the here and now; discreteness — the particular character based on the metonymic means of expression; dynamism — instant changes in the perception of the viewer depending on the situation (interaction and competition of images); intertextuality — endless references to well-known images and traditional ‘icons’; suggestiveness — ability to form the necessary attitudes of the public; concentration — focus on one goal and reliance on several facts to look believable; targeting — focus on the target group which is stimulated to take action, while other groups acquire a positive image (‘in a standby mode’ — a postponed strategy of providing an alternative option).

The media combine these characteristics of the image to influence public opinion through value personification — a kind of ‘animation’ of values in the image of a significant person (hero). Lazarsfeld introduced the concept ‘opinion leaders’ [12] to emphasize the change in the model of mass communication — from ‘media-recipient’ to ‘media-opinion leaders-recipient’: opinion leaders increase the amount of information, because their assessments play the role of a catalyst of public opinion. Thereby, the image of reality becomes animated and close to the consumer of information with the help of those who take on the function of clarification — the opinion leaders’ authority makes the audience trust them or at least listen to them. Today, this classical model for the mass society works perfectly with only one refinement — to acquire the status of the opinion leader, it is no longer necessary to be a real ‘hero’, because ‘false heroes’ also implement the function of value personification: it is not necessary (although desirable) to present a positive role model or demonstrate true heroism — ‘false heroism’ can be no less successful in shaping behavior patterns.

For more than a century of its history, cinema has been a subject of debates about its potential to influence the mass consciousness: on the one hand, real life and people’s views are the basis of movies; on the other hand, cinema as a part of mass culture shapes the perception of life. So, the philosophical question is whether

cinema is identical to reality or, on the contrary, does not possess the necessary language and means of expression to correspond to reality due to being rather art than a mechanical reproduction of reality. Initially, film-makers believed that cinema was to mechanically reproduce reality and promoted its scientific status as a way of representing changes in any phenomenon for its further analysis; however, later cinema was ‘captured’ by show business. In the early 20<sup>th</sup> century, some scholars believed that cinema represented reality accurately, without subjective distortions typical for painting [4]; while others, on the contrary, called human consciousness ‘cinematic’, because it breaks reality into parts perceived, thus, breaking the indivisible duration of life. Both approaches have their point and theoretical background; however, what is more important, is that the content, visual and discursive means of filming, and patterns of their perception and interpretation are determined by the culture to which the viewer belongs.

Despite his inclination to compare what he sees on the screen with personal experience, culture inevitably stands between him and movie reality as a sign system of a higher level that suppresses private perceptions and puts the viewer in the space of his culture [27]. Thus, when analyzing movies, we face a certain paradox: according to its visual series, cinema is the most real of all arts, but at the same time it is also the most illusory, which is explained by a combination of the traditional media and fiction mechanisms of image formation with the cinema’s focus on the emotional perception of images by the audience. Certainly, all the above applies to the presentation of heroes in movies for heroism is one of the most important ideas reflected in cinema throughout its history, and sociologists should try to assess the influence of cinema on social ideas about heroism [see, e.g.: 38].

Third, we need to identify the possibilities of the empirical sociological study of the types of heroes and their representation in the media (cinema). For instance, there are at least several techniques for studying the audience’s perception of movies, which can be focused on the construction and presentation of heroism: ‘thinking out loud’ in combination with conversational analysis; dichotomous questions while watching a movie with a gadget; making a video from the key moments of the movie; reconstruction of viewers’ associations with the movie [see, e.g.: 1; 24; 26]. Certainly, this is not the final list; moreover, these techniques are rarely used by sociologists who prefer more ‘sociological’ methods such as traditional surveys, content analysis and, less often, the unfinished sentences technique. Thus, content analysis [see, e.g.: 13; 34; 37] of visual images is a tool for studying viewers’ perception, especially in combination with some techniques mentioned above: for instance, viewers, after watching a movie, make a short video from its most memorable moments, and content analysis allows to identify and group frames and situations that evoke the greatest response; after the ‘thinking out’ technique, viewers’ verbal reactions can be grouped by content-analysis in order to identify the most typical and the rarest comments; content analysis can be used in the study of reviews in the Internet which ordinary viewers write after watching a movie (such comments can be compared with the reviews of professional critics), etc.

According to the unfinished sentences technique, respondents finish sentences independently choosing the criteria and semantic basis for answers [see, e.g.: 7; 21; 23; 35]. Verbal reactions to the first, unfinished, part of the sentence allow the researcher to identify the main characteristics of the image under study — social norms, values and stereotypes. For instance, we used content analysis in combination with the unfinished sentences technique to consider the image of the hero presented in movies in two perspectives — cinematic standards and viewers' perception. With the content analysis means, key 'heroes' of movies were identified together with their characteristics and life situations; the images of 'heroes' in the Russian cinema were reconstructed, and the most popular 'heroes' for national and international audiences were compared (the sample consisted of the Russian movies that were the most successful in the country and abroad). The unfinished sentences technique allowed to identify the preferred characteristics of the movie heroes for different generations (children and parents): the survey questionnaire was designed to find out respondents' ideas about heroism in general but included a set of questions on images of heroes in cinema — to compare social representations of a 'real hero' and a 'movie hero'. The combination of two methods — content analysis and unfinished sentences technique — helps to reveal, at least to some extent, how cinema affects social representations and how society perceives this influence.

For instance, the research confirmed the hypothesis that the most common type of hero in the contemporary Russian cinema is the warrior-hero, but only in relation to the movies successful at the box office both in Russia and abroad and not to the movies that received national and international awards. The hypothesis that the good-doer hero would be represented mainly by female characters was also confirmed. In general, the Western public is more interested in the good-doer hero if the movies that received awards and critics' approval are concerned; while the mass audience in Russia and the West prefers warrior-heroes. In the movies that interested the Western audience the most, women mainly play the role of good-doers and, in general, traditional 'female roles'; while in the movies that interested the Russian audience the most, women mainly played the role of adventure-seekers and warrior heroes, and antagonists of main characters.

The hypothesis that the main type of the hero for the younger generations would be inspirers and for the parental generation rather rescue heroes was partially confirmed, because both generations prefer the rescue hero in real life, while in the movie, the younger generations prefer inspirers and adventure-seekers. Another hypothesis was also confirmed — that the youngest generation (high-school students) is mainly inspired by the movies about superheroes, the younger generation (university students) — by more 'real' heroes, and the older generation — by the heroes of Soviet movies. There is a discrepancy among respondents from the children generation: in real life, they define 'hero' as mainly the rescuer, while in the movie — as the inspirer. In other words, children support an inspiring interpretation of heroism — as a struggle with one's fears and internal problems rather than with enemies or circumstances.



This short review of the possibilities of the sociological study of heroism could have finished here, but there is a brand-new issue associated with heroism, which became evident under the pandemic and is certainly worth mentioning. Sociologists are interested not only in the mass attitudes to the covid-19 pandemic, people's fears and trust/distrust in the actions of the authorities, etc., but also in some general changes in social representations including interpretations of heroism. For instance, we all witness the current heroization of healthcare workers due to their selfless fight against the coronavirus epidemic. Some years ago, Russians named as heroic professions primarily rescuers and the military, today doctors and teachers are increasingly mentioned as heroes in the answers to the open-ended questions.

Thus, WCIOM (Russian Public Opinion Research Center), in its analytical review 'Heroes of the Year 2020', provided data on whom Russians considered heroes of 2020 and what qualities the hero should have [18]. According to the Russian public opinion, the person/hero of 2020 should be honest, decent and fair (13%), most likely a doctor or teacher (9%), active, communicative and purposeful (8%), brave, fearless and with strong character (8%). In general, these qualities are similar to those in previous years, and the main difference is that the emphasis was made on the professions of doctors and teachers. Most often, when choosing from the list of professions, Russians called doctors the heroes of the year (55%), then emergency rescuers (31%), virologists and developers of the coronavirus vaccine (22%). At the same time speculators who increased the cost of drugs and artificially created their shortage (44%), and also alarmists (30%) were named anti-heroes together with politicians who criticized measures against the pandemic (21%), covid-dissidents (19%) and regional leaders who did not cope with the pandemic challenges in their regions (11%).

Such a change in the public's list of heroic professions was quite expected under the covid-19 pandemic; however, there are unexpected interpretations of this change. For instance, some scholars argue that the concept 'heroism' is not always appropriate when healthcare workers during the pandemic are concerned: heroism implies voluntary helping others with some degree of personal risk [see, e.g.: 15; 39; 40]; the hero 'label' that the media 'puts on' healthcare workers as if obliges them to make sacrifices beyond their professional responsibilities [10]. Moreover, heroism in its classic definition possess an aura of myth and magic, which negatively affects the real assessment of the doctors' work as if turning them into mythical characters, i.e., instead of heroization, society should provide doctors with all possible help and support. Certainly, such heroization is determined by the mass media coverage of the pandemic [31], which proves that the sociological study of heroism is a search for answers to the above mentioned three questions — types of heroes; sources of their heroic images and interpretations; methods and techniques to reveal, on the one hand, the media presentation and construction of heroic images and, on the other hand, social representations of the hero determined by many different factors but mainly the media.

#### **Funding**

The article was prepared with the support of the "RUDN University Program 5-100".

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DOI: 10.22363/2313-2272-2021-21-1-169-180

## **Три вопроса в основе социологического изучения героизма\***

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Несмотря на понятную и предсказуемую незаинтересованность социологов в проблематике героизма, поиск четких и однозначных концептуальных и эмпирических определений героя в современном обществе — важная социологическая задача, особенно в условиях нынешней пандемии, которая возродила интерес общественного мнения к критериям, которые позволяют называть человека героем в силу выполнения им социально важных задач (пусть и в рамках своих профессиональных обязанностей). Автор кратко характеризует основные элементы традиционной трактовки героизма — той, что прослеживается повсеместно в устойчивых социокультурных нарративах, и переходит к обозначению тех вопросов, что составляют предметное поле социологических исследований героизма. Первый вопрос заключается в поиске не столько единого определения героя, сколько типологии героев, основанной на социальных представлениях о том, когда и

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Статья поступила в редакцию 01.11.2020 г. Статья принята к публикации 03.12.2020.

посредством каких действий и решений герои «раскрывают» свою суть. Автор отталкивается от традиционных типологий героев, которые подчеркивают психологические аспекты героического мышления и поведения, чтобы предложить собственную типологию на основе как литературы, так и российских опросов общественного мнения, — чтобы типология помогала искать ответы на вопросы, почему общество нуждается в героях, что именно делает человека героем в глазах общества и что такое лжегероизм. Второй исследовательский вопрос затрагивает источники образов и трактовок героизма и фокусируется на масс-медиа и особенно кино с точки зрения их способности конструировать образы героев и героических социальных практик. Третий исследовательский вопрос касается возможностей эмпирического социологического анализа типов героев и их репрезентации в масс-медиа (кино). Автор полагает, что социология должна опираться на собственную методологию (контент-анализ, опросы, особенно на основе метода неоконченных предложений), сочетая ее с методиками изучения зрительского восприятия, и приводит собственные примеры, позволяющие сопоставить социальные представления о «реальном» герое с кинообразами. В заключение автор отмечает формирование новой тематики в рассматриваемом предметном поле в условиях пандемии — изменения в социальных представлениях о героизме, обусловленные героизацией медицинских работников благодаря их самоотверженной работе.

**Ключевые слова:** герой; типы героизма; определение героя; лжегерой; масс-медиа; кино; социологические методы; эмпирическое исследование; опрос

### **Информация о финансировании**

Статья подготовлена при поддержке Программы РУДН «5-100».