

學術對談

媒介傳播學的理論化：理論建構與發展 ——對話帕梅拉·休梅克

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(Prof. Pamela J. Shoemaker)

「一個新理論的創建，需要對其所採用的理論及操作框架進行嚴密建構、對系列基於理論與操作關聯基礎上的推想與假設予以命題推理，以及對測試假設的方法進行嚴格論述。休梅克教授的例子論述了如何從生物學及文化進化理論中衍生出『硬線新聞』¹理論的過程。該理論闡釋了為何許多新聞都關乎數據、規範及社會改變方面的『異常』，以及全球新聞概莫能外的原因。『異常』，構成世界上大多數新聞；國家間的差異也在很大程度上取決於不同文化對『異常』的不同定義。」

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Dialogue

Theorization, Theoretical Building and Development—Dialogue with Pamela J. Shoemaker

Discussants: Pamela J. SHOEMAKER, Yu HUANG, Gang HAN

Abstract

Creating a new theory requires a disciplined outline of the constructs used (with theoretical and operational definitions), a list of theoretical statements (assumptions and hypotheses, each with theoretical and operational linkages) and methods that can test the hypotheses. Shoemaker's example discusses building a theory of "hard-wired news," which is derived from theories of biological and cultural evolution. The theory explains why much of the news is about statistical, normative and social change deviance, and why this is true around the world. Deviance makes up much of the world's news, and differences between countries largely rely on how deviance is defined culturally.

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帕梅拉·休梅克，美國雪城大學 (Syracuse University) S. I. 鈕豪斯公共傳播學院榮休教授，曾擔任雪城大學公共傳播學院 John Ben Snow 講席教授逾 21 年。她在俄亥俄大學獲傳播學學士及碩士學位，並於威斯康星大學獲得大眾傳播學博士學位，曾在奧斯汀德克薩斯大學新聞學系任助理及副教授。其著作包括《中介信息》(*Mediating the Message: Theories of Influences on Mass Media Content*)、《全球新聞》(*News around the World: Practitioners, Content, and the Public*)、《把關人理論》(*Gatekeeping Theory*) 等。曾任頂級期刊《傳播研究》(*Communication Research*) 聯合主編、美國新聞與大眾傳播教育學會 (AEJMC) 會長。她曾榮獲 AEJMC 頒發的最高研究獎，並獲得俄亥俄大學、德克薩斯大學及威斯康星大學頒發的學術生涯成就獎。

PS：帕梅拉·休梅克

YH：黃煜

GH：韓綱

YH：我想把我們的談話大致分為兩個部份。首先，對您在傳播學研究領域中的理論建構、邏輯梳理及其他方面的學術貢獻做一個概要性的回顧；其次，是探討如何將您之前建構的理論運用到社交媒體與人工智能的媒介場景中——它們是否依然新穎有效、或正在發展或已經發生改變？19年前，當34本著作被遴選為美國20世紀最具影響力的大眾傳播書籍，您與斯蒂芬·里斯 (Stephen Reese) 合著的《中介信息》(*Mediating the Message*) 榜上有名。我們首次讀這本書的時候，都還是學生。今天能邀請到您，非常高興。

PS：我非常樂意接受您的邀請。您提到《中介信息》這本書，它獲獎的時候沒人比我更驚訝。一開始我並不知道，直到我的一名學生告訴我，我才從《新聞與大眾傳播季刊》的一篇文章中看到這則消息。

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GH：我想在學術研究中，我們致力解決的問題核心在於：如何勾聯起這個領域中各種令人振奮的理念，來建構嶄新的理論、或讓現有的理論與時俱進？對於這點，願聞其詳。

PS：理論建構是我們學科面臨的最大問題，但我們做的還遠遠不夠。部分原因緣於大眾傳播研究的歷史發展脈絡。20世紀50年代初，斯坦福大學、伊利諾伊大學、威斯康星大學和其他一些院校首開先河，進行了大眾傳播學博士學位的授予。這些首批大眾傳播學博士、教授們受教於諸如社會學、心理學、政治科學及經濟學等各個社會科學院系，自然而然會運用這些學科的理論進行研究，時至今日，許多研究甚至仍然依照其他社會科學學科的理論而展開。舉一個例子，大眾傳播學最古老的研究方法之一，就是由社會心理學家庫爾特·盧因(Kurt Lewin)提出的「把關人理論」(Gatekeeping Theory)。介於跨學科研究的理論路徑是可取的，原則上這並無任何不妥，畢竟就像我的博士指導教授斯蒂芬·查菲(Steven Chaffee)所說的那樣，「其他社會科學學科也著實歸於傳播學研究範疇——只是他們尚不知曉而已」。

然而，在我看來，對社會科學理論的強調阻礙了大眾傳播學科理論的發展，尤其體現在媒介內容如何被影響的研究上。新聞與社交媒體方面研究顯現理論匱乏的現象，因為社會科學理論並沒有為學者提供媒介內容研究的相應概念。這就是為什麼新聞及大眾傳播院校的學者們通常從事更多應用性研究、而非理論性研究的原因。

事實上，大眾傳播學同時牽涉社會科學與媒介內容產生過程。如果我們試圖建構能夠成功契合當今複雜傳播環境的理論的話，必須將我們所知的一切都擺上檯面來進行勾連與分析。隨著社交媒介的發展，社交傳播與大眾傳播的邊界區分逐漸模糊、日益趨同，這正是我們理論工作的重要領域。

在我學業生涯的大部分時光，我都嘗試去促進理論性的思考。當年吉姆·坦卡德(Jim Tankard)、尼克·拉索薩(Nick Lasorsa)和我合寫《如何建構社會科學理論》(*How to Build Social Science Theories*)的時候，我們試圖向學者展示如何建構原生理論去解決他

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們的問題。我們相信，通過勾勒理論各部分的輪廓，能夠幫助大家如何更廣泛地思考——需要拿什麼來建構自己的理論。關於我自己，我的思緒通常停留在抽象層面，或許我並非那樣關注我生活的日常周邊，但卻始終思考著我感興趣的事物之間的聯繫。我的目標（有些不謙虛地說）是在大眾傳播學中推展理論建構——以助其他學者更為抽象地思考其自身研究的興趣點。

YH：在理論建構中，需要解決的關鍵要素是什麼？

PS：我的方法從來都是——廣泛思考。例如，如果我身處公共關係研究領域，我不僅會考量公關問題和議題，通常也會跳出公共關係文獻、深入到社會科學領域去展開閱讀。重要的，是要廣泛思考；其後一旦感知到什麼具有研究的可能性，便可集中我們的注意力到這個點上。除此之外，學者還應對自己的觀點給予充分的孵化與思考。即便有時會擔心自己的觀點不如人，但我們的許多想法值得去追求，並理應如此。思想是理論的核心。缺乏原創性的想法，對於新理論的建構而言，無異於「巧婦難為無米之炊」。

GH：我依然記得我在雪城大學攻讀博士學位時，從您那裡學習的課程。您說，想把這個領域對媒介內容效果的傳統研究焦點轉移到媒介內容生產的研究上——是什麼激勵您想做此研究焦點的轉移呢？

PS：大抵原因歸於我還在威斯康星大學求學的時候，我所感興趣的和當時教員們所熱衷研究的事物之間的脫節。史蒂夫·查菲和傑克·麥克勞德（Jack McLeod）當時正研究兒童、電視暴力及其政治社會化。這些基本上都與社會心理學相關，我們被鼓勵選修大量社會心理學課程。我當時卻對新聞內容分析感興趣，最終在我自己的研究中也沒有用到任何社會心理學方面的資訊。

我的新聞內容研究開始於一項研討會項目。在一個小實驗中，我證實了即便信息保持不變，對政治團體的新聞描繪詞語也可以讓它們喪失合法性。這進而衍生出我的第二篇研討會論文和博士論文。通過對記者們對11個政治團體的態度考察，我進一步對報紙文章內容進行分析，以此評估這些團體的合法性是如何被描述的。我的結論是，記者的個人特徵與政治態度對團體的政

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治合法性而言並不重要，重要的是記者們如何對這些團體的「異常」進行分級。但是，為什麼「異常」會如此重要呢？

問題意識是理論建構最為重要的工具之一。我不停自問，為何記者們會對政治團體進行區別對待呢？最後我落腳到這樣一個問題上：「為何我們有『新聞』？」一旦問出這樣的問題，你就會意識到，我們有新聞並非出於新聞對經濟、政治或文化體系的必要性，而是民眾需要它們。歷史學家已經證實，在印刷術發明之前新聞便已產生：沿街高聲廣播消息的公告傳報員從一個村莊到另一個村莊，把民眾們關注的信息傳報給他們——無論是國王駕崩，抑或是戰爭來臨。這些消息都與「異常」相關：關乎異象的發生、規則的僭越或律例的破壞；關乎對社會制度的威脅，譬如革命。這與早期報紙報導衝突或「煽色腥」新聞並無二致。

然後我問自己，為何人們如此熱衷於異常新聞？答案至少部分涵蓋了「威脅」在裡面：你擔心新的政黨會侵佔祖國——對社會制度甚或自己的個人福祉造成威脅；你擔心孩子在學校裡接觸到毒品，故而主動接收任何關於毒品的新聞信息，以便在與孩子交心時掌有談資；你擔心孩子過馬路時或有被車撞到的風險……事實上，你持續不斷地打量著生活的周邊，搜捕潛在威脅的信息，而最具威脅性的事件——橋樑的坍塌或校園槍擊事件，都堪稱「異常」。因此我得到的結論是，民眾想要越軌消息，我的研究也證實，許多新聞都關乎「異常」。

對「異常」的研究興趣促使我轉向社會學和人類學，最終我意識到或許用得達爾文的生物進化論。在真正開始動筆之前，我差不多花了三年時間，進行大量閱讀和充分學習，閱讀和思考佔據了我此段期間的時光。由此得出的結論是，從達爾文學說觀點來看，為規避風險而進行環境監視是「適者生存」的體現，好比我們的遠古祖先，能夠積極監測老虎動向、用火把驅趕它們的那一撥最有可能存活下來、生生不息。然而，我也發現，文化對「異常」的定義至關重要，一種事物在這種文化體系中屬「異常」之列，在另一種文化系統中卻司空見慣。我最終將生物學和文化進化論二者結合，來幫助我們理解「新聞」——由此我開始著手建構自己的理論。

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以上並非回答您問題的最直接的答案，但我想您從中也可以看出，我的理論不是媒介效果，我的興趣著眼點在媒介內容建構與發送之前的所有事情。正因如此，我也是當時學院博士學位項目中唯一一位對媒介效果研究毫無興致的「獨行客」。但這種研究興趣的分道揚鑣並未使我氣餒，我不想把餘生的研究放在和別人走同一條道上。

YH：這的確促使您作出非常多的原創性貢獻。

PS：我想是的。我開始更廣泛地思考媒體內容的影響，現在這一路徑則通常被稱為「媒介社會學」。我在德克薩斯大學工作時撰寫了一本專著《新聞理論之建構》(*Building a Theory of News*)，這是我在閱讀包括諸如甘斯(Herbert J. Gans)、吉特林(Todd Gitlin)、塔奇曼(Gaye Tuchman)等在內所有20世紀70、80年代直至90年代偉大媒介社會學家的著作後的思考結晶。其中——我想應該是甘斯——建議我們應該著眼於記者、媒介組織及文化中去研究新聞。這引導我認真思量，究竟應立足於哪一種分析層面去研究媒介內容如何被影響。

適逢上世紀80年代，許多學者都投身到媒介偏見研究中。我對這些把關注重心放到對個體記者影響上的研究文獻並不著迷。在我看來，不同媒體對同一事件的展現差異應該被更恰當地描述為「現實扭曲」，即一個事件因其廣泛的影響而被兩家媒體以不同的方式報導，而非僅屬記者個體所為。甘斯曾經寫過媒介組織建立的工作慣例，諸如文稿風格或交稿期限等，但我認為媒介組織還有一些其他的特性會影響到發佈的內容，例如組織的所有權，於是我花費了很大功夫去判斷這些因素是否應歸屬於同一分析層級。最終我認定，記者的報導方式與諸如公司的盈利能力是兩碼事。然後我想到甘斯所謂的「媒介外影響」(extra-media influences)，如政府規限；最終是更高層次影響的作用，如意識形態。不同層次的影響因素在我腦海中迴旋。當斯蒂芬·里斯和我在1991年及1996年編撰首兩版《中介信息》(*Mediating the Message*)時，我們依照這樣的順序——記者個體、工作慣例、媒介組織、媒介外組織及意識形態——來設置分析的章節層次。政

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府機構(如警察、法庭、法規)、宗教組織，都會對媒介內容產生影響，它們與廣告商、營銷行業一樣，同屬媒介外的社會組織機構；意識形態與文化則更為抽象，牽涉人口、地理及資源的獲取，關乎社會體制的特徵。到了2014年這本書第三版推出時，斯蒂芬·里斯和我決定在書中改用涵蓋更廣的術語——「社會機構」(以取代「媒介外組織」)和「社會制度」(以取代「意識形態」)。我們一致認為，這兩個宏觀層面的分析或許會比微觀層面的分析影響更為重要。

YH：請您稍微再詳細闡述，為什麼您認為「媒介外組織」及意識形態層面的影響更為重要？

PS：《中介信息》第二版及第三版的出版時間相隔15年，其間斯蒂芬和我「行萬里路，讀萬卷書」，或許想法也更為成熟。1991年(初次撰寫該書)時，我們並不是真正想要從個體分析層面入手去撰寫；甚或當時我們假設個人影響更為重要，僅僅是因為它們最容易被觀察到。而著手第三版內容的修訂時，我們則更加意識到社會制度影響的重要性，因此將探討順序(及當中的兩個名稱)改為：社會制度、社會機構、媒介組織、工作慣例與記者個體。許多社會系統理論，包括馬克思主義、霸權主義、世界體系理論及功能主義等在內，都可以運用到媒介內容分析中，使五個分析層次理論紛呈。我們在第三版中的每個分析層級都提出了相應的理論，但這並非源於在我們看來這些就是媒介內容研究能用到的唯一理論，而是在於我們相信，這些範例理論將引導學者們思考出更多的觀點——越思考，越期待思考。我們也不期望諸如社會學習理論一類會被視為世上頭等重要的理論，它只是內容研究探索中的進階石而已。

GH：我們對您是如何將信息流控制的「關口」(gates)的概念發展為您的著作——《中介信息》，後來又出版了《把關人理論》感到好奇。我們怎樣才能從中一窺三者間的理論關聯？

PS：斯蒂夫·查菲引導我走上了把關人理論的研究道路。當我獲得博士學位後，在一次會議上遇到他。他說：「我正在編輯一套叢書，想讓妳來做一個專題」。我提出想做和新聞相關的主題，但

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他表示這個題目已經被別人捷足先登。他問：「『把關人』怎麼樣？」我說：「『把關人』？這個概念已經是明日黃花！」但他堅持要我做這個題目，於是我開始著手閱讀所有我能找到的相關文獻。我拜讀了庫爾特·盧因在1940年代末首次提出「把關人」理論的系列文章，之後又讀了大衛·懷特(David Manning White)在1950年發表的論文，其中探討了他稱之為「把關人先生」(Mr. Gates)——報紙編輯的研究。有件事不容易被意識到，即個體對某一主題的喜好感受，對其決定是否刊發一篇文章有很大影響。不喜歡教皇的，就不會傾向於選用關於教皇的文章，對其他不喜歡的標題亦同理；也有一些其他的因素，比如編輯已經接受了一篇相同主題的文章，其他類似文章也會被拒之門外。但已有研究證實，個人觀點會影響到新聞的擇取。我記得查菲告訴過我，懷特做過庫爾特·盧因的研究助理，這也是為何他能迅速發現「把關人行為」理論的原因。盧因在二戰後一直在研究食物把關，但他提出這一理論或同樣可適用於其他決策制定，例如對新聞項目的選擇上。懷特的研究促使許多新聞學教授撰寫了新聞選擇的相關文章，其中大多數都聚焦在新聞工作的慣例上。懷特影響了我的餘生，因為此後我一直在把關人領域躬耕不停。

在《把關人》之前，我曾寫過如何建構新聞理論的專著，這也促使我去思考我們應從不同分析層面去研究把關行為。因此我決定去觀察那些作為整場事件的關鍵個體：「關口」，是決定性的點，而把關人，則是做出決策的那個人。由此我展開決策理論的閱讀，此前我對這一塊所知甚少。關於人們在作出決策時所採用的各種策略，已有大量理論產出。我所關心的是如何把它們融入我的研究中。我開始聯想到組織，擬了一份初稿，把之前研究中的把關模型囊括進來，想著應當如何在結合盧因理論及新聞學教授創建的若干模型基礎上，建構我自己的理論。因此我畫了一張草圖，在一個組織框架內以圈狀圖形式來展現把關人架構。這份初稿供斯蒂夫·查菲閱後，他告訴我，這不夠好，因為我把所有的把關人都放在了框裡面。「去讀些邊界跨越的文章」，他說。這幫助我把其中一些把關人挪到了框架邊緣：一些人，例如記者，

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將他們與信源交談的信息引入到組織框架中；而其他把關人則製作出內容、和受眾交談、作營銷研究，因此我得出結論，在整個組織架構中，一定存在著一些跨界協調者 (boundary spanners)。當查菲看過我修改後的草圖，問我為何一些圈狀圖依然存在於架構中。我解釋說，這些是編輯、文字編輯和欄目編輯——這些人對他們工作頻道下的文章都有發言權。

接著查菲問：「有沒有想過團體思維 (group think)？」我不知其然，所以他讓我去閱讀一些小團體中的成員如何增強彼此決定的研究文獻。如果團體內成員不能從外部引入信息，這將危及把關過程——同類型文章會多次通「關」而入，新的想法卻會被拒之「門」外——導致不再會有任何新決策的發生。

然後查菲提出我需要考慮多個組織之間的關係。由此我在文中論及兼具收集信息和向各個媒介組織遞送信息功能的跨界協調者，例如美聯社。現在我們把這種行為叫做「媒介間議程設置」，但當時這個術語還沒有產生。組織之間會彼此溝通，因此在我的模型中又囊括進了兩個組織、外加受眾。

受眾起初被看作是相當被動、由個體組成的匿名群體。從媒體到受眾的信息傳播過程也被視為單向傳播。除了諸如「讀者來信」之外，受眾的反饋很少，對媒介內容的影響少之又少。而今對受眾的討論則有些不同尋常——因為受眾不再是匿名的了。許多受眾擁有一個甚或多個社交媒體帳號，事實上可以發佈他們自己的內容。記者可以訪問這些內容，挖掘社交媒體帳戶以獲取數據與看法。他們也會通過自己的社交媒體帳號去和其他在線用戶互動。因此，現在已經出現此前匿名的受眾創建並發佈自身內容的現象。人人都能成為廣大受眾的溝通者，人人亦是多向傳播受眾中的一分子。對我來說，把社交媒體中的「記者」和「讀者」當作不同群體來寫，並無多大意義。一些美國報紙還會邀請讀者參與到文章評論等內容建構中。以《紐約時報》為例，它開放了大多數文章的評論部分，如果讀者同時閱讀過文章及部分評論，評論的內容可能會改變文章的性質，甚至會改變讀者對這一話題的看法和態度。邀請進行這種對話的媒介組織正在創造一種全新的東

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西、一種社交媒體和大眾媒體的融合。其結果便是，再將受眾與大眾媒體剝離來談，無異於老掉牙的傳統思維。我想，對廣告業和公共關係行業而言，有時因著特定產品和想法來考慮目標受眾的需求是講得通的，但更大層面、全球理念下的受眾實際上涉及到每一個人。

YH：我們現在所談論的社交媒體正處於人工智能高歌猛進的時代，一切皆與AI相聯。方才您提及記者與讀者及其角色的融合，可否談談您在新時期下對把關理論的貢獻、以及這一理論結合時代發展的計劃、進展與功能？讓我們了解更多關於把關理論的改進、變化和挑戰。

PS：我在這個問題上思考多年了。我最近被邀請為在線《牛津新聞百科全書》(the online *Oxford Journalism Encyclopedia*) 撰寫一份新聞業中把關行為的介紹，在來這裡之前我剛剛完成。因為試圖解決「關口」、受眾及一切相關概念的變化，我在術語的運用中艱難穿行，花了很長時間才定稿。我已經得出結論——並且將在明天演講的結尾部分揭曉——即，在當今複雜的傳播環境中，我們需要引入系統理論去研究把關行為。

時至今日，互聯網已經誕生30周年。我的第一次網絡使用體驗是在1988年，那時為著一個學術會議，我必須發送一篇論文到以色列去。上世紀90年代《紐約時報》推出網絡版時，我成為一名網絡狂人。告別在書桌上翻看篇幅巨大的報紙的時代，取而代之的是在電腦上瀏覽新聞。若是回溯過去30年的媒體行業，我們就會發現，隨著互聯網的發展，大眾媒體行業已然衰落。那些只研究報紙的人可能會告訴你，傳播者的數量業已減少，原因在於20世紀大眾媒體組織數目的劇減。但事實上，這段時間內傳播者數量反而穩步增長，形成一種高度複雜的局面：大眾媒體間相互交流，社交媒體亦是如此，與之同時，社交媒體用戶與大眾傳媒人士也在你來我往互通有無。除此之外，還出現了我稱之為的「超級把關人」——「超級」意味著高高在上——諸如微信、Facebook、Twitter、YouTube及所有社交媒體平台。之所以稱它們為「超級把關人」，是因為它們對內容實施把關控制，這種控制

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與個體用戶及大眾媒體對其內容施行的把關控制並不相同。超級把關人立足高於其他傳播者的分析層面，它們搜選大眾媒介訊息、社交媒介帖子及個人博客內容，或任何它們在互聯網上想要的東西，對其進行內容整合、重塑與再現，使之改頭換面。這些蜂擁而入的媒體新聞源呈現出不斷隨時間而變動社會現實。因此我們同時擁有了不同新聞源、社交媒體用戶發言帖和大眾媒介新聞——在這種情況下，「把關人」是更少還是更多了呢？我想，無窮無盡的把關人正在產生。

YH：與傳統的四、五個層級相比，您在把關人理論概念層面增加了一個新的分析層級，即「超級把關人」層級。那您是否依然使用傳統的五個分析層級進行分析，還是需要對原有層級結構進行改造重組？這正是我們極為關注的問題，正如我們希望從您那裡獲知一些較牛津大學出版社印發的文章內容更新的東西。

PS：把關與媒介內容影響研究並非各行其是，它只是在更大研究框架中的一個分析過程。我們可以從多個分析層次來看待把關行為，涉及個體記者層面，從大眾媒體記者、到社交媒體作者，再到博客撰寫人，關乎他們的個人態度、年齡，或凡此種種，以及這些因素對他們的寫作內容有何影響；之後你可以著眼於工作慣例層面觀察一整套操作實踐：資訊以這樣的方式被獲取，信息被創建，編輯們決定事件是否被報導。故事寫出來，有人編輯它，圖像被處理，所有這些得以發佈與傳遞。

在社交媒體方面，你或許會說把關人並不存在。但我完全不同意。每當內容被選取或否決時，都有把關人在做決策。假如我只是一名個人博客的寫作者，我也會同樣成為一名把關人，因為我採用的信息並非都是原創，而是可能在轉發一些已經以某種方式發佈的資訊內容。還有一些常規的發博程序，比如使用博客軟件，你最終需要填入內容並點擊發佈按鈕。之後你瀏覽讀者評論，這些都有可能影響到你未來的博客內容寫作方向。若你發佈的內容人皆憎之，你可能會選擇持之以恆，或是作出改變。一些小型互聯網組織已經成長為大型媒體，例如《赫芬頓郵報》(*The Huffington Post*) 起初只是一個博客，後來發展為一家主要的在線

媒體。現在它已改名為 *Huff Post*，成為一家公司例程類似於前互聯網時代新聞媒介的機構化媒體。

在社交媒體中，從簡單的日常活動到複雜的工作例程都是連續存在的，但我們也需要將其視為從小到大的組織架構。盈利能力這一塊說來有趣。網絡媒體間存在著大量爭取廣告投放的競爭，但也有一些改變了它們的收入模式。例如與紙質版收入相反，《紐約時報》網絡版的訂閱收入已經超出其廣告收入。過去報社通過發行量來組織和了解他們的讀者，但這一塊收入並不可觀，發行成本卻高企不下——如今他們則通過訂閱量來盈利。

說到社會機構，則是政府影響一切。比如 Twitter、Facebook、Google 和 Apple 這類提供大量新聞服務的機構負責人，都曾在美國國會作證。美國國會正考慮是否應對在線媒體進行監管。在歐洲，此類法規已經生效。儘管多種社會體制並存，但我們也需要考慮社會制度對媒體報道的影響——為何國與國之間對於同一事件的媒體報道會大相逕庭？差異究竟是源於作為一種社會制度變量下的文化因素、還是一種文化體系中的社會機構因素？在一切塑造媒介內容的力量中、在所有內容分析的層面上，都閃現著把關人的身影。

YH：我想請教您一些關於社交媒體時代理論須如何應變的問題。這個時代正在以我們無法描述的方式演變，傳統的傳播學理論面臨的問題和挑戰是什麼？當把關行為、中介信息、中介、異化及其他相關概念已被大量研究之後，您認為青年人和年輕的學者們應當如何再去探索它們？互聯網誕生 30 周年的今天，理論上出現了新問題和新挑戰。

PS：理論就是「理論」，並將永遠如此。一個理論絕不會消失，兩級傳播理論與組織理論至今依然存在。我想，年輕的學者們需要去了解過往的思想，因為思想不受時空限制——想法 A 可以激發更具典型性的想法 A +，或是略有不同的觀點。因此，學習所有關乎媒介效果和內容影響研究的理論，這非常重要。我在與年輕學者們交流時，發現他們中的許多並不了解自己學科的過往歷史——施拉姆或拉斯維爾到底寫過什麼？如果想要創建新的理論，就須

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了解理論的過去，這並非是要你採用任何具體的理論，而是利用舊的理論去激發新的想法，走上一條別人都沒有走過的道路。這是建構好的理論的唯一途徑。

YH：還有一個關於方法論的問題。您做過大量內容分析的研究。在您看來，技術、特別是機器學習，對傳統信息分析方法的影響是怎樣的？

PS：這是個好問題，但我不知道答案。我對用計算機程序來分析內容的方法不太熟悉。這種機器編碼的挑戰在於要有能力去識別抽象概念。拿「政治合法性」來舉例，你不會發現僅一句「政治合法性」便構成一篇報紙文章的內容，相反，必須得在文中去找尋相關指標。當我在寫作博士論文時，在文獻中發現了22個合法性指標。我問斯蒂芬·查菲應該用哪一個。他回答道：「我不知道。你自己想辦法。」於是我把它們用了個遍！但它們被分解成了四個理論維度。這便是計算機編碼難以企及的地方。當人類變得足夠聰慧時，可以創造電腦程式來讀出理論性的細微差別，那時電腦程序將做到和人類編碼不分伯仲。這樣的變化持續在發生。

GH：讓我來問一個關於新聞教育的簡短問題：新聞行業專業性的日益降低。如果我們看到像新聞編輯這種傳統意義上的把關人在新聞製作過程中的作用日漸式微，我們應當如何去培訓未來的新聞記者？當今似乎人人都被社交媒體賦權而成為平台的把關人，換言之，假如人人都能在社交媒體站點上發佈新聞，我們對專業新聞記者的培訓是否仍是必須？

PS：在我所說的紛亂嘈雜的把關系統中，唯一能夠確保信息真實性及公正性的，就是專業記者。社交媒體用戶沒有受訓接受專業規範的考量，不能理所當然地指望他們提供公允、真實的內容，因為他們自己也從未朝這方面想。我認為在這場大範圍的把關過程中，記者需要作為一種聲音而存在，來提供信息供人們據此作出重要的決定。在社會體制中，除了記者能承擔起這樣的義務，「捨我其誰」？我不想再談論客觀性，因為這個概念已經被濫用了，但真實性和公正性這兩點依然是我們所公認的優質內容之必需。理性人士需要優質內容去分析他們身邊的問題。如果人們只

是得到荒謬、虛假的信息，他們可能會把它傳出去，因為內容太離經叛道、太妙趣橫生了。就算他們不相信，也可能會四處傳播。

註釋

- 1 休梅克教授曾在其研究中提出hard-wired news (「硬線新聞」)的概念，即「滿足人類與生俱來、規避風險需求的新聞」。意指新聞有滿足人們與生俱來需求的特性。正如一些軟新聞好比軟件編程一樣，滿足人類追尋越軌消息需求的新聞，就像鋪陳電線的基礎設施，是人類生存延續之基礎。相關含義參見Shoemaker, P. J. (1996). Hardwired for news: Using biological and cultural evolution to explain the surveillance function. *Journal of Communication*, 46, 32–47.

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Academic Dialogue with **Pamela J. Shoemaker**

Theorization, Theoretical Building and Development—Dialogue with Pamela J. Shoemaker

PS: Pamela J. SHOEMAKER

YH: Yu HUANG

GH: Gang HAN

YH: We would like to divide our talk into two parts, with the first part being a review of your major contributions to communication research regarding theories, academic logic and so forth. The second part is to understand how it applies to social media and artificial intelligence in theory, whether they are still valid or developing or new, and whether there are changes. 19 years ago, 34 books were selected as the most influential mass communication books in the 20th century, one of which was *Mediating the Message*, written by you and Stephen Reese. We all read this book when we were students, and we are very happy to have you here.

PS: I am happy to have been invited. No one was more surprised than me when *Mediating the Message* was selected to be honored. I didn't know about it until one of my students pointed it out and I read the article in *Journalism & Mass Communication Quarterly*.

GH: I guess the core issue we really want to address in academic endeavors is how to build theories or develop the existing theories, by connecting various exciting theoretical notions with each other in this field. We would like to hear more about this from you.

PS: Theory building is the biggest problem we have in our discipline—there is not enough of it. This is partially due to the historical development of mass communication research. In the early 1950s, the first mass communication PhDs were awarded by Stanford, Illinois, Wisconsin, and other universities. These first doctoral-level journalism and mass communication professors were taught

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by faculty from the social sciences, such as sociology, psychology, political science, and economics. As a result, mass communication scholarship began using these disciplines' theories, and much research today is still based on theories from other social science disciplines. For example, one of the oldest approaches used to study mass communication is gatekeeping theory, which was proposed by the social psychologist Kurt Lewin. There's nothing wrong with this in principle, given that interdisciplinary research is desirable. After all, as my doctoral adviser Steven Chaffee has said, the other social science disciplines are really also communication departments—they just don't know it yet.

In my opinion, however, the emphasis on these social science theories has impeded the growth of mass communication theories, especially for the study of influences on media content. Studies about news and the social media initially tended to be atheoretical, because social science theories did not offer scholars concepts relating to media content. This is why scholars in journalism and mass communication schools have sometimes produced applied rather than theoretical research.

The fact is that the study of mass communication involves both the social sciences and the processes that produce media content. We need to bring everything we know to the table if we are to build theories that can successfully address today's complex communication environment. As the social media have grown, the difference between social and mass communication has become less defined and more like one system. This is an important area for theoretical work.

For most of my career, I have tried to encourage theoretical thinking. When Jim Tankard, Nick Lasorsa and I wrote the book *How to Build Social Science Theories*, we wanted to show scholars how to build original theories to address their problems. We believed that we could teach people how to think more broadly by outlining the parts of a theory—what you need to build your own theory. I guess I've generally thought on an abstract level. I may not be aware of my everyday surroundings, but I am always thinking about the connections between things I'm interested in. My (somewhat immodest) goal became to improve theory building

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in mass communication generally—to help others think more abstractly about their own interests.

YH: In theory building, what are the key elements to address?

PS: My approach has always been thinking broadly. If I were in public relations, for example, I would not only consider public relations issues and problems, but I would also read beyond the public relations literature into the social sciences in general. It is important to think broadly and then to narrow our focus once we know what might be possible. In addition, scholars should give due consideration to their own ideas. Sometimes people think their ideas aren't as good as someone else's, but many of our ideas could be worth pursuing and should be. An idea is the kernel of a theory. You can't create a new theory without that original idea.

GH: I still remember the class I took from you when I was working on my doctorate at Syracuse. You said you wanted to shift the field's traditional concentration on the effects of media content to the prior stage in which content is created. What inspired you to switch to this focus?

PS: I guess it was a result of the disconnect between what I was interested in studying at the University of Wisconsin and what the faculty were then interested in. Steven Chaffee and Jack McLeod were studying kids and television violence and also their political socialization. It was all social psychology, essentially, and we were all encouraged to take lots of social psychology classes. I was interested in news content, and it has turned out that I haven't used any of the social psychology information in my own research.

I began my news study with a seminar research project, a small experiment, in which I showed that the words used to describe political groups could delegitimize them, even if the information was held constant. This led to a second seminar paper and then to my dissertation. I surveyed journalists' attitudes toward 11 political groups and then analyzed the content of newspaper articles to assess how legitimately they were portrayed. My conclusion was that journalists' personal characteristics and

political attitudes were not important; rather, political legitimacy was strongly related to how deviant journalists rated the groups. But why was deviance important?

Asking “why?” is one of the most important tools in theory building. I kept asking myself why journalists would treat political groups differently. I finally came to the question “why do we have news?” Once you ask this question, you come to realize that we don’t have news because it’s necessary for the economic, political or cultural systems. Rather we have news because people want it. Historians have shown that news came before the invention of the printing press: Town criers went from village to village telling people about events they were interested in—the king is dead or war is coming. This news was about deviance, about something unusual or about laws and norms being broken. It was about threats to the social system such as revolution. The same was true of early newspapers—stories about conflict or sensationalism.

Then I asked myself why people would want deviant information. The answer at least partially involves threats. You are concerned that a new political party could overrun your country—that’s a threat to your social system and maybe to your personal wellbeing. You are worried about your children being exposed to drugs at school and so you look at news for drug information and anything that can help you talk to your children. You are concerned that your kids might be hit by a car while crossing a street. In fact, you are constantly surveying your environment for information about possible threats, and the most threatening events—a bridge has crashed or there has been a school shooting—are very deviant. So I concluded that people want deviant information, and my research led me to the conclusion that much news is about deviance.

My interest in deviance led me to sociology and anthropology, and eventually I came to think that Darwin’s theory of biological evolution might be useful. I read a lot and learned a lot. I probably spent three years reading and thinking before I began to write. I came to the conclusion that surveying the environment for threats was adaptive in the Darwinian sense, such that our ancient ancestors who looked out for tigers and chased them away with

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a firebrand were most likely to reproduce and pass down their genetic heritage of subsequent generations. But I also concluded that culture was crucial to the definition of deviance, that a thing could be deviant in one culture and normal in another. I finally put it together, that both biological and cultural evolution could help us understand news, and I began to build my own theory.

This is an indirect way of answering your question, but I think you can see that my theory was not going to be about media effects. I was interested in everything that comes before content is created and distributed. And so, I was the only person in my doctoral program who was not interested in media effects. But having different interests didn't discourage me. I didn't want to spend the rest of my life studying someone else's concerns.

YH: That really led you to make lots of original contributions.

PS: I guess so. I began thinking more generally about influences on media content, what we now usually call media sociology. I wrote a monograph *Building a Theory of News* when I was at the University of Texas, which was the result of my having read all of the great media sociologists of the 1970s, '80s, and '90s, such as Gans, Gitlin and Tuchman. One of them—I think it was Gans—suggested that we should study news by looking at journalists, media organizations and culture. That led me to consider which levels of analysis should be used to study the influences on media content.

At the time, the 1980s, many scholars were writing about media bias. I wasn't a fan of the bias literature, which put most of the attention on influences from individual journalists. I thought that differences between media portrayals of an event should more appropriately be described as distortion, that an event would be covered differently by two newspapers because of a wide array of influences, not just from individuals. I think Gans wrote about the routines that media organizations established to do their work, for example, writing styles or deadlines. But I thought that there were other characteristics of organizations that influenced the content they published, such as ownership, and I had a hard time deciding whether they should be on the same level of analysis. I finally decided that the way journalists do their work is a separate issue

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from, for example, the profitability of the company. Then I began thinking about what Gans called extra-media influences, such as government regulations, and finally about the role of higher-level influences, such as ideology. I thought about the influences that belonged on each of these levels. When Stephen Reese and I wrote the first two editions of *Mediating the Message* in 1991 and 1996, we put the levels of analysis chapters in this order: individuals, routines, media organizations, extra-media factors, and ideology. Extra-media includes government (such as the police, courts and laws) but not ideology. And religion is an extra-media influence on media content, but culture is more abstract. Government and religion are social institutions, as are advertising and marketing. Ideology and culture are characteristics of social systems, as are population, geography, and access to resources. By the time our third edition came out in 2014, Stephen Reese and I decided to use the broader terms social institutions (instead of extra media) and social systems (instead of just ideology). We also thought that these two macro levels of analysis might be more important than influences from the micro levels.

YH: Could you elaborate a little bit on why you thought the extra media and ideology levels were more important?

PS: There were 15 years between the second and third editions of *Mediating the Message*. Over that time, Stephen and I traveled, read a lot and perhaps matured intellectually. In 1991 we didn't really decide to begin with the individual level of analysis; maybe we assumed that individual influences were more important because they were most easily observed. As we began writing the third edition, we were more aware of the importance of social system influences, so we changed the order (and two names) to be: social systems, social institutions, organizations, routines and individuals. There are many social system theories that can be drawn on to study media content, including Marxism, hegemony, world systems, and functional theories. There are many theories on all five of the levels of analysis. We offer theories in each of our levels in the third edition, not because we think these are the only theories that should be used to study media content, but rather

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because we believe that example theories will lead scholars to think of even more ideas. More thinking will happen, and more thinking is what we want. We don't want something like social learning theory to be thought of as the most important theory in the world. It is just one stepping stone to other and greater ways of studying content.

GH: We are curious about how you developed theoretically from studying ideas about “gates” that control flows of information to *MTM*, and then to *Gatekeeping Theory* most recently. How can we see the kinship among all the three things?

PS: Steven Chaffee started me on the path to gatekeeping. After I got my doctorate, I met him at a conference, and he said, “I'm editing a series of volumes and I want you to do one.” I said that I wanted to write about news, but he said that topic was already taken by someone else. He said, “how's gatekeeping?” I said, gatekeeping, that's an outdated concept! But he said that he wanted me to write about gatekeeping, and so I began reading everything I could find on it. I read Kurt Lewin's articles that originally proposed a theory of gatekeeping in the late 1940s. Then I read the 1950 article by David Manning White about his study of a newspaper editor, whom he called Mr. Gates. One thing people don't remember is that a big influence on his deciding whether to publish an article was his own personal feelings about the subject. He didn't like the Pope, he said, so he wasn't inclined to select articles about him. The same was true of other topics he disliked. There were also other factors, such as whether he had already accepted an article on the same topic, but there was evidence in the study for personal opinions influencing the selection of news. I think Chaffee told me that White had been a research assistant for Kurt Lewin and that is how he found out about gatekeeping theory so quickly. Lewin had been studying food choices after World War II, but he had mentioned that the theory might also apply to other decisions, such as the selection of news items. White's article led many journalism professors to write articles about news selection, most of them focusing on the routines of news work. White affected the rest of my life, since I have been writing about gatekeeping ever since.

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Before *Gatekeeping*, I had written my monograph about how we could build a theory of news, and that led me to think about how we can study gatekeeping on different levels of analysis. So I decided to look at individuals, who are the key to the whole thing: The gate is the decision point, but the gatekeeper is the person who makes that decision. So I began to read about decision theories, which I didn't know much about. There are a lot of decision theories and lots of work out there about the strategies people use in making various kinds of decisions. I wondered how I could incorporate that into my work. Then I started to think about organizations and I wrote a draft for Steven Chaffee to edit. I had included the gatekeeping models from previous studies, and then thought that I should create my own model—how these models from journalism professors would combine with Lewin's theory. So I created a drawing that showed gatekeepers (circles) in an organizational box. Chaffee told me that it wasn't good enough, because all of my gatekeepers were within the box. "Read about boundary spanning," he said, and that led me to put some of my gatekeepers on the edge of the box: Some people, such as reporters, bring information into the organization from the sources they talk to. But other gatekeepers produce content, talk to the audience, and produce marketing studies, and so I concluded that there are boundary spanners all over the organization. When Chaffee looked at my revised drawing, he asked me why some circles were still inside of the box. I said that they are editors, copy editors and section editors. These people all have a say about the articles in their channels.

Then Chaffee asked "what about group think"? I didn't know what that was, and so he sent me to read about how people in small groups reinforce each other's decisions. If they failed to bring in information from the outside, this would threaten the gatekeeping process. The same type of articles would jump over the gates many times, whereas new ideas would be rejected. There wouldn't be any new decision making going on.

Then Chaffee said I needed to think about relationships among multiple organizations. So I wrote about boundary spanners such as the Associated Press, which both collects and send information to individual media organizations. Now we call

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this inter-media agenda setting, but we didn't have that term at the time. Organizations do talk to each other, so in my model I included two organizations plus the audience.

The audience was originally thought to be fairly passive, an anonymous group of individuals. Communication was considered to be unidirectional from the media to the audience. There was little feedback except in terms of letters to the editor and so on, but these had rare influences on content. This type of thinking led scholars to study the effects of media content on the audience. Today the discussion of the audience is a little weird, because the audience isn't very anonymous anymore. Many audience members have one or more social media accounts, in effect leading them to publish their own content that is accessible by journalists. Journalists mine social media accounts for data and ideas, and they interact with social media users by having their own social media accounts. So now we have the formerly anonymous audience members creating their own content and publishing it. Everyone can become a communicator to large audiences and everyone is also part of the audience—multi-directional communication. It doesn't make much sense to me to write about “journalists” and “users” of the social media as if they are distinct groups. Some US newspapers invite audience members to contribute to media content, such as by commenting on articles. The *New York Times*, for example, opens most of its articles for commenting. If you read both the article and some comments, the comments may change the nature of the article and they may even change your attitude about the topic. Media organizations that invite this kind of conversation are creating something entirely new, a merging of the social and mass media. As a result, talking about the audience as something separate from the mass media is old thinking. I suppose it makes sense for advertising and public relations to sometimes think about target audiences for specific productions and ideas, but the audience in the bigger, global sense has turned out to be just about everyone.

YH: I want to ask that we are faced with social media in a more progressive artificial intelligence age and everything connecting

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to AI. My issues are also related to tomorrow's presentations, gatekeeping functions and effects in social media age. Just now you have mentioned the merger of journalists and the audience and their roles. How about your contributions to gatekeeping, and the schemes, processes and functions in the new age? I would like to know more about modifications, changes and challenges to gatekeeping.

PS: I have been thinking about this for years. I was recently asked to write on piece on gatekeeping in journalism for the online *Oxford Journalism Encyclopedia*, and I finished it just before I came here. It took me a long time to write it, because I was struggling with the ideas of gates, audience users and everything—just struggling with the nomenclature to use. I've concluded—and I'll go to the end of tomorrow's lecture—is that we need to use system theory to study gatekeeping in today's complex communication environment.

This is the 30th anniversary of the creation of the World Wide Web. My first internet experience was in 1988 when I had to transmit a paper to Israel for a conference. When the *New York Times* went online in the 1990s, I became a web crazy person. Instead of reading the newspaper in its huge paper format on my desk, I began reading it on my computer. If we look at the media industry over the past 30 years, we see that, as the internet has grown, the mass media industry has declined. People who study only newspapers might tell you that the number of *communicators* has declined, because the number of 20th century mass media organizations has declined. But in fact the number of *communicators* has increased steadily over this period of time, creating a highly complex situation: The media communicate with one another, as do the social media, and the social media's clients communicate with mass media people. In addition, we have what I am calling supra gatekeepers—supra meaning above—such as WeChat, Facebook, Twitter, YouTube and all of the social media platforms. I call them “supra gatekeepers” because they exert gatekeeping control on content that is independent of the gatekeeping control exerted by their individual clients and by the mass media. Supra gatekeepers are on a level of analysis above other communicators. They select mass media content, social

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media posts and blogs or whatever they want from the internet. They put it together, shape it, repeat it, making it something different. These streaming news feeds present a version of reality that continuously changes over time. So we have news feeds, posts from individual social media clients and news from the mass media. Do we have fewer gatekeepers or more? I think we have zillions of gatekeepers.

YH: On the conceptual level, you have added one new analysis level, that is supra gatekeeper level, compared to the traditional four or five levels. Are you still using the traditional five levels, or you need to reorganize that? That's why we are paying lots of attention, as we like to hear something new from you especially from the article from Oxford Press, something new.

PS: Gatekeeping is not something separate from studies of influences on media content. It is just one process within that larger frame. We can look at gatekeeping on multiple levels of analysis, from individual journalists to social media writers and blog writers. What are their individual attitudes, age, or whatever, and how does that influence the content they write. Then you can look at the routines level, the set practices of doing work. Information comes in such a fashion, messages are created, editors decide whether an event will be covered, stories are written, someone edits it, images are edited and it all gets published or transmitted.

On the social media side, you might say that there are no gatekeepers, but I totally disagree. Every time a decision to select or reject content is made, there is a gatekeeper making that decision. If I am just one individual writing my own blog, then I am a gatekeeper because the information is not all original with me. I may be reposting things that have already been published in some fashion. And there are routines—routines of doing blogs, such as using blog software—and you need to eventually put the content in and hit the publish button. Then you look at readers' comments and these might affect your future blogs or writing. If everyone hates what you're saying, you might continue to pursue it or might change it. Some small internet organizations have grown into large media. For example, *The Huffington Post* began as a blog

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and then grew into a major online newspaper. Now it is the *Huff Post* and has become an institutionalized newspaper with routines similar to those of pre-internet newspapers.

There is a continuum within social media from simple routines to the very complex, but we also need to consider them as organizations, from small to large. Profitability is very interesting. There is much competition among online media for advertising dollars, but some have changed their income model. For example, the online *New York Times* now has more income from subscriptions than from advertising, the opposite from their paper edition. Newspapers used to sell subscriptions as a way to organize and know about their readers, but the income was not significant and distribution costs were high. Now they sell subscriptions to make money.

As for social institutions, government influences everything. For example, the heads of Twitter, Facebook, Google and Apple—all of whom have streaming news services—have testified before the US Congress, which has been considering whether they should regulate online media. In Europe, such regulations have already been put into effect. Although there are many social institutions, we also need to consider social system influences on why one country's media coverage of an event differs from another's. Are differences due to culture, which is a social system variable, or due to social institutions within one culture? Gatekeeping takes place within all of the forces that shape media content, on all levels of analysis.

YH: I would like to ask you some questions about how theories need to change in the social media age, which is evolving in ways we cannot now describe. What are the problems and challenges that our traditional communication theories face? How do you think young people and young scholars should study gatekeeping, mediated messages, mediation, deviation and so forth, all of which have been studied a lot? After 30 years with the internet, there are new issues and challenges to theory, right?

PS: Theories are “theoretical,” and always will be. A theory never goes away. The two-step flow theory and theories of organization are still there. I think young scholars need to know about past

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ideas, because ideas are not time bound or situationally bound. Idea A can spark Idea A Prime, or something slightly different. So learning about all theories that have been used to study media effects and about influences on content is very important. I have found in talking to young scholars that many don't know their history—what Schramm or Lasswell wrote. If you want to create new theories, you need to know the history of theory, not to adopt any specific theory, but to use older theories to spark a new idea, to go down a path that no one else has traveled. That's the only way to build good theory.

YH: I have another question related to the methodology. You have done lots of research with content analysis. What do you think about the impacts arising from technology, particularly machine learning, on traditional ways of analyzing messages?

PS: It's a good question, but I don't know the answer. I'm not sufficiently familiar with computer programs for analyzing content. The challenge for such machine coding is to be able to discern abstract concepts such as political legitimacy. You won't find the phrase political legitimacy is a newspaper article. Instead you have to look for indicators of legitimacy. When I was working on my dissertation, I found 22 indicators of legitimacy in the literature, and I asked Steven Chaffee which one I should use. He said, "I don't know. You figure it out." I used them all! But they broke down into four theoretical dimensions. That's the kind of work that is difficult for computer coding to achieve. When humans become smart enough to create computer programs that can read theoretical nuances, then they will be as good as human coding. Change like that is always happening.

GH: Let me ask a question about journalism education: journalism is becoming less professional. If we see traditional gatekeepers like editors taking a less important role in the process of news production, how should we train future journalists? It seems that everyone is empowered today to be a gatekeeper on social media platforms. In other words, if everyone can break news on social media sites, do we have to train professional journalists?

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PS: In this great mess of a gatekeeping system that I am talking about, the only people who are there to ensure that information is truthful and fair are professional journalists. Social media users are not trained to consider professional norms. You can't necessarily expect fair and truthful content from them because they've never thought about it. I think journalists are needed as a voice in the big gatekeeping process, to provide information on which people can make important decisions. Who does this in the social system other than journalists? I don't talk about objectivity anymore because the concept has been bashed around too much. But truthfulness and fairness are two things we can all agree are necessary in good content. Reasonable people need good content to analyze the problems around them. If people are just given absurd, false information, they might pass it on because it is so deviant, so juicy. Even if people don't believe it, they might pass it on.

Selected Works by Pamela J. Shoemaker

Please refer to the end of the Chinese version of the dialogue for Pamela J. Shoemaker's selected works.