Although 2008 marks a watershed moment for digital electoral campaigning, the practices that were widely extolled as revolutionary have a much longer history. Campaign websites have played a role in US communications efforts since the mid-1990s, when the Clinton/Gore and Dole/Kemp campaigns developed the first presidential campaign websites. The voter data programs that campaigns now use daily have their roots in tools developed in the late 1980s, and have benefitted from evolution and infrastructure building within parties. The very data such programs rely upon still involve opinion polls, which have been a meaningful part of campaigns since the 1960s.\(^1\) Although campaigns were slow to adopt the participatory, reciprocal affordances that were tenets of web 2.0 (O’Reilly, 2005), the 2004 Dean campaign and 2008 Obama campaigns’ use of social platforms such as Facebook, Meetup, and Myspace marked a more fundamental shift: the rise of social media campaigning.

Social media campaigning marks both an evolution of traditional campaign practices and a space of opportunity for new strategies and norms to emerge. In the years since 2008, campaigns of all sizes have had to grapple with the adoption of digital tools to supplement their existing methods of persuasion and mobilization, which has led to strategic and technical innovation, as well as the solidification of some existing practices. This chapter highlights what social media strategies look like now that the dust of the revolutionary 2008 elections has settled, what effects these emerging strategies have had on a variety of campaign goals in both the American and European context, and how the on-the-fly adoption of new tactics and tools has resulted in unintended consequences for campaigns. Specifically, this chapter drills down further into three particular social media campaign strategies and their unintended consequences – opening up campaign content to public feedback while encouraging citizens to ‘talk back,’ the adoption of widely available, popular social media platforms, and the increase in campaigns’ attention to analytics.
To investigate these practices, this research combines a review of quantitative campaign research that draws primarily on US and European cases with original qualitative research investigating campaign tactics, professional trainings for political consultants and staffers, and campaign messages in the US. It draws on data spanning the years 2010–2014, including ethnographic observations of a federal-level campaign in 2010, in-depth interviews of over 40 campaign consultants following the 2010 and 2012 campaigns, brief interviews with an additional 15 staffers and consultants following the 2014 election, and textual analysis of training sessions at professional consulting conferences over the course of those four years (Baldwin-Philippi, 2015). The original research in this chapter is devoted to the US, although it attempts to draw attention to similarities and differences in uses across national contexts to highlight the ways country-context matters and can influence strategic choices.

As campaign practices evolve over time and adoption differs across national contexts, this chapter draws on actor-network theory (Latour, 2005) to situate the emergence of new practices as a product of individual staffers and consultants as well as the technologies they deploy, and emphasizes both the material aspects of social media as well as their patterns of use. In line with calls for communication studies as a discipline to more deeply investigate the material aspects of communication technologies (Boczkowski & Lievrouw, 2008), this chapter also focuses on the affordances and interfaces of social media and analytics platforms in order to illuminate the ways platform changes result in shifts in strategy or priorities for campaigns. Though deductive and quantitative approaches still drive most political communication research, the adopted inductive approach allows for investigation into the socio-technical interactions between campaigns and technologies. Such an inquiry can illuminate the causes and consequences of emerging campaign strategies, and, in turn, develop digitally-situated theories of political participation and institutional politics, as has been called for in recent years (Bennett & Iyengar, 2008; Karpf, Kreiss, Nielsen, & Powers, 2015).

Combining a review of quantitative, international literature with qualitative work in the US context, this chapter seeks to explain how social media campaigning builds on and influences prior campaign strategies. First, it will illuminate the current state of cutting-edge social media strategy in the US and explain how social media platforms are currently used in other countries, while also focusing on the impact of this use on citizens. Second, it highlights the problem of unintended consequences in the adoption of new social media platforms: changes to both the user interface and backend of Facebook and Twitter from 2010 to 2014 have played a vital role in the development of social media content and impacted strategic decisions. Third, this chapter will discuss the normative, democratic implications of these practices.

WHAT ARE CAMPAIGNS DOING?

Obama’s 2008 campaign has been dubbed the Facebook election by academics and journalists alike (Harfoush, 2009; Lutz, 2009; Sabato, 2009; Trippi, 2008), as it was the first to make use of social platforms that are now commonplace in political campaigns, and harness user-created content in these spaces. Although other examples of pioneering digital campaigns exist, such as Australian Labor Party (ALP) Leader Kevin Rudd’s 2007 use of Myspace to garner support en route to the ALP’s victory and become Prime Minister, the Obama campaign was perceived as the first to combine use of social platforms with on-the-ground mobilization in a wide-scale and effective manner. The Obama 2008 team used YouTube to provide volunteers with backstage videos from campaign staffers and
the candidate himself, and the user-created video, ‘I got a Crush On Obama’ was so popular that it was later named a top ten meme of the decade by *Newsweek* (Allison, 2009). The Obama campaign had over 2 million Facebook followers and more than 112,000 Twitter supporters, to John McCain’s 600,000 and 4,600 respectively (Dutta & Fraser, 2008), and they also made use of blogging networks and other more niche platforms like Flickr, Digg, LinkedIn, BlackPlanet, and MiGente. While these platforms themselves were less robust than they are now, the Obama campaign created groups to which supporters could subscribe in order to show their support, receive campaign updates, and find sharable images with Obama’s campaign logo, website and picture on them. Despite these new tools that the campaign deployed, the successes of the Obama campaign and the national Democratic party more broadly were, as Daniel Kreiss (2012b) has detailed, rooted in the party’s adoption of technology in the following election cycle. Moreover, as Rasmus Kleis Nielsen’s work has shown (2012), while social media were exciting and highly visible in campaigns in 2008, campaigns relied much more heavily on using voter data to make in-person contact with potential voters through traditional mobilization efforts like canvassing.

Following the Obama campaign’s wide margin of victory, and the perception that social media was a driving force of the campaign’s success, political campaigns at all levels proceeded to get on board, campaigning through social media. Despite the fact that political campaigns’ goals remain the same in an age of social media campaigning – electing a candidate through a combination of persuasive messaging, mobilizing fundraising and volunteer efforts, and getting out the vote (GOTV) – social media platforms have allowed campaigns to make slight changes to the ways they go about these goals, and have even catalyzed the adoption of a handful of new ones as well.

All of these changes are due not only to the availability of social media tools and their increasingly widespread adoption by campaigns, but are also a product of the changing technological affordances of these platforms. Insofar as social media are provided by privately-run companies, decisions about what to allow campaigns (or any account manager) to do, how and when paid-programming can purchased, and even the visual layout of the user interface are out of the campaigns’ control. As campaigns adopt these social media platforms and their changing technological affordances, their own strategies and emphases concerning how and when to use such tools change as well.

**Social Media Adoption**

In the years since the Obama campaign’s 2008 victory and the subsequent coronation of social media campaigning in American politics, campaigns’ use of social media tools – social networking systems like Facebook and Twitter, as well as less socially-oriented platforms like YouTube – has increased rapidly. In 2010, as statewide and local campaigns began to grapple with the adoption of digital media, the presence of campaign-controlled social media accounts was clear, but not ubiquitous, with 78% of Senate and House campaigns using official YouTube channels, 71% using campaign Twitter accounts, and 82% using campaign Facebook accounts (Williams & Gulati, 2011). Just two years later, the use of such platforms had become nearly universal, with 97% of Senate campaigns and 90.2% of Congressional campaigns using an official Facebook account (Gulati & Williams, 2015), and has stayed stable.

In contrast, European political campaigns have been slower to take up social media platforms at both the candidate and party level. In 2010, social media campaigning was said to have ‘failed to fire’ in Germany (Marcinkowski & Metag, 2014) and the UK
(Aldrich, Gibson, Cantijoch, & Konitzer, 2016), with only 30% of campaigns using social networks. By 2013, these numbers had risen only to 76.6% of campaigns having profiles on either Twitter or Facebook, with a slightly lower number (72.3%) actively maintaining those accounts (Hinz, 2014). Similarly low use numbers for elections occurring in 2010 and 2011 occurred in the Netherlands (32%) and Finland (19% of candidates) (Vergeer & Hermans, 2013). Not only did many European candidates and parties refrain from the immediate post-Obama-’08 uptake in social media; in many cases this trend continued in the years to come. In 2013, only 26.2% of Australian candidates were on Twitter, and that percentage was largely composed of candidates who were party spokespeople or ‘frontbenchers’ (Bruns & Highfield, 2015). Similarly, Norway’s 2013 election saw only 24% of candidates with social media accounts, and Sweden’s election that same year saw a meager 19% (Larsson, 2015). Across most countries, candidates belonging to opposition parties, or those not in power, are more likely to adopt Twitter as a channel to get out their message (Jungherr, 2016).

Although European candidates’ use of social media looks considerably different from candidates in the US, these countries’ party-centric parliamentary systems and subsequently reduced need for candidates to craft personal political identities are the likely reason for such vast differences. Indeed, we see that parties’ use of social and digital media is widespread, and perceptions of its importance are similar across European nations. Signaling the adoption of what Andrew Chadwick (2013) has called the hypermedia style, the use of social tools do spread from the US, outward, even if specific tactics and strategies are influenced by the local political contexts (Lilleker, Tensch, & Štëtka, 2015). Candidates in the European context, in contrast to the US, do not seem to provide voters with personal information, in social media content or elsewhere (Hermans & Vergeer, 2013; Kriesi, 2012). The phenomenon of candidate or party adoption of professionalized, consultant-based campaign strategies is not limited to the adoption of social media tools. Campaigns also use analytics software to assess the impact of digital campaign communications. As McKelvey and Piebiak (2014) have shown, off-the-shelf analytics tools like NationBuilder, which were developed and first used in US campaigns, are now widely used in Canada.

**Persuasion in Social Media**

As campaigns increasingly adopt social media and discover best practices for crafting content that is popular and persuasive, social media messages have emerged as a genre that in some ways mirrors traditional broadcast messaging, while making small changes that allow campaigns to take advantage of networked relationships. Campaigns’ early use of social media saw a repetition of traditional communications strategies, as campaigns in 2010 often used Facebook and Twitter as places to amplify the same persuasive messages they were used to creating, rather than developing new norms of content. As a result, their social media accounts were often overrun with press releases and campaign ads. In 2010, out of fourteen Senate and Congressional level campaigns in Illinois that had an active social media presence, nine of their Facebook accounts had a plurality of traditional content such as event coverage, press releases, and links to stories on their own campaign websites. Not only was the content often identical across these platforms, with campaigns taking advantage of programs that automatically pushed content from one platform to the other, but campaigns also used it as a way to link back to their own campaign websites. As one communications director from a Congressional race explains it, ‘Capturing people and getting them stuck in something like flypaper – they go to your website ...
then they’re looking at your education plan, and go to the Facebook page, and the Facebook takes them to the Twitter feed, Twitter feed takes them to the YouTube page … they’re continuing to browse and they’re staying on your message’ (personal communication, January 18, 2011).

Similar findings showed that both US (Gerodimos & Justinussen, 2015; Hemphill, Otterbacher, & Shapiro, 2013) and European campaigns used social media for unidirectional, broadcast communication, including the UK (Graham, Broersma, Hazelhoff, & van ‘t Haar, 2013) and Germany (Jungherr, 2016). Additionally, in a small study of how elected officials’ from the US Congress, European Parliament, and Korean National Assembly used Twitter as of 2012, Otterbacher, Shapiro, and Hemphill (2013), found that interactive features such as tagging, @replying, retweeting, use of pictures and videos, and so on, are not widely used. Despite studying only a handful of representatives, their findings indicated that the European MEPs and Korean assembly members used more of these interactive features than their counterparts in the US Congress. A much larger-scale study of US campaigns’ use of Twitter by Jason Gainous and Kevin Wagner found that challengers and Republicans were more likely to use those features (2013).

Interestingly, while social media messages take the form of unidirectional, broadcast messages, their content is not an exact duplication of campaigns’ mass media strategies. Major differences lie in the fact that social media content is less issue-based, and more often used to draw attention to campaign events and opportunities to get involved with campaigns, and that it is more positive than television advertisements (Bode et al., 2011). Moreover, these same findings show that external political factors that have historically made it likely a campaign will use negative ads, such as incumbency or closeness of the race, do not make it any more or less likely that these same candidates will publicize negative content in social media spaces. While social media content has been increasingly image-driven since 2010 and those images have become more professional in their aesthetics and composition (Baldwin-Philippi, 2015), political campaigns have also begun to harness the popularity of memes in social media, crafting content that is humorous and that encourages citizens to create similar content of their own (Graef, n.d.).

As campaigns and advocacy groups alike adopted networked communication platforms, they innovated the channels through which they dispersed their broadcast-style messages. Not only were they publishing content on social media platforms, but the flow of campaign communications became networked as well. As Daniel Kreiss (2012a) has shown, the Obama campaign used bloggers on the activist left to break news stories that would likely damage the opposition. A related practice also spread in the subsequent election cycles, with campaigns commonly feeding stories to partisan political bloggers when they could not get the subject picked up by more mainstream reporters with wider circulation. Beginning in 2010, most campaigns also directly enlisted supporters to spread, pass along, and share social content – even before the practice was so widespread that Facebook introduced a ‘share’ button to make the practice even easier (Baldwin-Philippi, 2015).

Social media platforms became especially productive means through which campaigns could identify and directly contact opinion leaders and/or surrogates, crafting a new, networked version of the two-step-flow of information (Katz & Lazarsfeld, 1955). Campaigns saw digital opinion leaders as especially valuable precisely because they expanded the population of valued opinion leaders beyond that of mainstream media, to include more diverse outlooks and critics of traditional media institutions. Similarly, while Twitter is most obviously a platform for publicly broadcasting a message to a campaign’s supporters and followers, it has also been used as a way to directly reach
out to individuals who may be engaging in political discussions online and persuade in more direct, interpersonal ways. This was a tactic that was sporadically deployed among the most tech-savvy digital consultants in 2010, but it was refined and routinized by the 2012 Obama campaign, when the campaign directly emailed Twitter users they had deemed opinion leaders on the platform to ask them to ‘Join the Obama 2012 Twitter Team […] help turn out the vote for President Obama […] Retweet! Retweet! Retweet!’ Communications and digital consultants who began this practice in a haphazard way as early as 2010 described seeking out undecided voters on Twitter in the weeks and days leading up to an election and reaching out to them directly in efforts to persuade (personal communication, March 4, 2011). To do so, however, required specialized targeting of more supportive members, which meant more precise data and advanced technical skill, and was thus a tactic used only by more advanced staffers and consultants. By 2012, the social network analyses and social media analytics that were both integral to locating these individuals were becoming a routine part of major presidential campaigns in the US. This level of data strategy was largely absent in European countries.

Micro-targeting and Mobilization

One of the most fundamental changes to digital strategy since 2008 has been the increasingly specific ability to target messages to individuals through email, social networks, and even individual online ads. This practice of micro-targeting has its roots in highly-segmented public opinion polls of the 1996 Clinton campaign, and has only increased with the advent of digital advertising. As social media platforms have become places where people disclose a large amount of personal information, campaigns are able to gain access to much of it when purchasing social media ads, and use it to categorize people based on geography, interests, issue-salience, or demographic information. Social media platforms allow campaigns to better know their audience, locate specific audiences, define and create their own audiences, and then target them with specifically tailored ads. This was a widely used tactic at the Congressional level as early as 2010. In terms of persuasive messaging, social media can be used to broadcast messages in the traditional, public sense, and to simultaneously micro-target those same messages to increasingly small slices of relevant potential audiences.

While the 2008 Obama campaign used Facebook to both broadcast and target their messages via public posts and advertisements respectively, the platforms and strategies for doing so have changed dramatically over the past eight years. In 2010, the line between public and targeted content was clearly drawn—posts were public (unless sent directly and privately to individuals), and advertisements were available to be targeted based on users’ location, age, gender, and interests. Though many campaigns engaged in both tactics, they were sometimes surprised and often frustrated at the difference in affordances, and their inability to use the targeting tools they used for advertising to target regular public posts or messages (Fieldnotes, August 31, 2010; September 1, 2010). By the 2012 campaigns, however, the line between the two had blurred. While there were still both advertisements and public posts, campaigns’ pages were given the ability to ‘promote’ (now ‘boost’) individual posts to audiences that could be targeted based on user location, age, gender, and interests. Social platforms like Facebook and Twitter have continued to blur the line between advertising and content by allowing campaigns to pay to promote their posts to larger audiences and target the populations who make up that audience. At the same time, micro-targeting has become even more common.

Mobilization efforts of all kinds, whether they be geared toward fundraising, soliciting
volunteers for campaign needs or getting out the vote, now involve activities that take place both on- and offline. While many of campaign’s most fundamental needs, such as getting out the vote, still necessarily rely on boots-on-the-ground volunteers, campaign field operations have also radically expanded the amount and types of data and analytics they rely on to know which doors to knock on and which hands to shake. Similarly, both persuasive and mobilizing messages have benefitted from the increasingly precise data used to identify and separate audiences and target them with different, pertinent messages.

Campaigns see social media not as an automatic conduit to increasing turnout or support, but as a way to increase the amount and depth of engagement they get from citizens. Since 2010, campaigns have been concerned with getting people engaged in easily enacted forms of political participation, which they hoped would lead to greater and more involved forms of activism later on. This constant, escalating ask is known to campaign and advocacy leaders as the ‘ladder of engagement’, and is central to campaigns’ digital strategy. ‘Once we know you’ll sign a petition, we can try to get you to forward them to friends, or donate money. … So you want to turn people who are on your email list into donors and/or volunteers; you want to turn donors and/or volunteers into super-volunteers. It’s a constant ask’ (personal communication, May 20, 2011). Recent research has supported the logic of this strategy, showing that the more citizens access political information online and use social media to express themselves politically, the more likely they are to take subsequent, more difficult mediated political actions (Vaccari et al., 2015).

Another major effort to directly combine online and offline mobilization has been the development of organizing platforms or action ‘hubs’ that citizens can log into, keeping track of their own acts of participation and sometimes taking action directly. These, like 2008’s MyBarackObama.com (known as MyBO) or Cruz’s Crew, the activism app from the 2016 Republican presidential primary candidate Ted Cruz, not only gave campaigns data, but made participation easy. While most campaigns below the presidential level lack the resources necessary to develop fully-fledged original social activism platforms, in 2012, top-tier campaigns began to enlist the services of consulting firms to provide the same tools. More often, firms would design campaigns’ official websites so they had the look and feel of a platform – they could link to phone banking directions or volunteer signups – without needing to devote time to the complex development task of credentialing users with their own accounts. During her first run for US Senate in 2012, the campaign website of Elizabeth Warren, rising star of the Democratic Party, contained an Action Center with nearly all of the same options for action provided by BarackObama.com, from receiving information or calling others, to joining groups within the campaign or attending events hosted by other citizens. This workaround enabled smaller-scale campaigns to draw on the rhetorical and aesthetic qualities of an original social activism platform and mobilize citizens, while working within their resource constraints. By April of the 2016 primary campaign, with help from tech-savvy volunteers, Senator Bernie Sanders’ campaign had not only developed a website that acted similarly to an action hub – FeelTheBern.org – but refined home phone banking technology, enabling volunteers to make over 47 million calls from their homes – on pace to surpass the Obama 2012 campaign’s numbers from the entire election (Issenberg, 2016; Scola, 2016). On the Republican side in 2015, the Cruz campaign added elements of gamification – points, leaderboards, and badges – to its action hub (and mobile app) to further motivate users to take more actions, such as calling potential voters or tweeting about the candidate.

As studies have tried to measure the impact of social media campaigning on persuasion,
mobilization, and general voter behavior, the findings have been inconclusive at best. At the most basic level, despite the immense amount of energy put into digital campaign communications, these messages go largely ignored by the public (Nielsen & Vaccari, 2013). When they are attended to, no relationship between campaign success and either overall number of followers or growth in followers has been found (Dimitrova & Byström, 2013; Vaccari & Nielsen, 2013). Despite little research in the area, early analysis of what kind of social media content drives citizen participation shows people are likely to engage with substantive issue-oriented posts (as measured by shares, likes, and comments), and that tone and timing also affect this (Gerodimos & Justinussen, 2015; Xenos, Macafee, & Pole, 2015). Such findings highlight the fact that digital campaigning’s benefit is unlikely to lie in its ability to reach and persuade new voters, but in its ability to mobilize, as was the case with prior digital tools as well (Bimber & Davis, 2003). At the same time, many other types of participation are increasing as well. Not only are people taking action online, but they are also engaging in what Chadwick (2009) has called high-threshold activities – canvassing, presence at rallies, phone banking, etc. – and low-threshold activities, such as signing petitions, donating, etc. (Vaccari et al., 2015). The use of digital tools to upgrade or personalize traditional strategies, such as using SMS text messages to get out the vote, rather than emails, mail or robocalls, have been shown to increase turnout by a handful of percentage points (Malhotra, Michelson, Rogers, & Valenzuela, 2011). Early data from the 2016 primaries indicate that new digital engagement tools have facilitated more political participation in the form of small dollar donations, phone banking calls and voter contacts than in prior election cycles (Scola, 2016).

Overall, as adoption of social media has become nearly ubiquitous, both the subsequent use of additional technologies and the development of new communications strategies have followed. On the one hand, social media content remains largely broadcast-oriented and relies on much of the same information as press releases. On the other hand, this content is also different from that of traditional mass media, as it is more positive, relies on photographs and infographics, and, at the local level, also tends to be more oriented toward announcing and recapping events than focusing on issues. Broadly, much of this content is concerned with mobilizing supporters rather than persuading the undecided. Micro-targeting ads and emails have enabled campaigns to focus on persuasion in these spaces, and simultaneously allow for more efficient mobilization efforts. These efforts, in turn, have been even more supported by the rise in proprietary tools like action hubs and mobile apps that use social elements to encourage people to take action over time and away from campaign headquarters.

The democratic implications for these new forms of campaigning are much debated. On the one hand, many have pointed to the use of analytics and micro-targeting as a form of controlling or managing citizens (Howard, 2006; Kreiss, 2012b). Despite these very real tendencies, others have argued that these changes imply new views of how citizens are organized in relation to one another and to political institutions (Wells, 2015), and that even actions that are managed by campaigns can act as openings for participatory citizenship (Baldwin-Philippi, 2015). In cases where citizens are actively discussing politics on social media platforms, there is increasing concern that these discussions are emblematic of polarization rather than deliberation and debate (Conover, Gonçalves, Flammini, & Menczer, 2012), although recent work, drawing on data from Germany, Spain, and the US, shows that social media can also reduce polarization (Barberá, 2015). Additionally, digital media outreach that focuses on the less politically-interested and less mobilized may be a potential answer to
polarization by mobilizing those with tempered perspectives (Prior & Stroud, 2015). While this chapter does not focus on advocacy campaigns, they offer additional reasons to be optimistic about the effects of digital and social strategies. Because they are removed from electoral time constraints and the zero-sum stakes of winning/losing an election, advocacy campaigns are better equipped to engage citizens in digital organizing, wherein they learn activist skills and facilitate the development and deepening of political social networks. This form of networked activism not only leads to productive structural changes to organizations that make them more focused on participation (Karpf, 2012), but facilitates actualized citizenship (Bennett, 2008; Wells, 2015). In all cases, the optimistic views on the possibility for digital and social tools to improve political life largely rely upon participatory and interactive methods of engagement.

THE UNFORESEEN CONSEQUENCES OF ADOPTING DIGITAL STRATEGY

As campaigns adopt social media, they also necessarily encounter new forms of content and opportunities for political communication that cause them to question old ways of doing things. This section examines three of these instances of emerging campaign strategies that have resulted in unintended consequences. They are a product of human agency and constraints of material technologies; they are driven by individual and organizational decisions and platform interfaces that are difficult (and in some cases impossible) to change; and, taking a wider view, they are also a product of the daily decisions campaign staffers make, and the larger economic environment of US campaigning that is constantly short staffed and short on funds. This section first discusses the changing norms surrounding campaign message control and citizen participation and discussion in campaign-supplied public forums (social media, commenting sections, etc.). It then turns toward analysis of the constraints imposed on all campaigns by their use of publicly available, proprietary platforms. Finally, it discusses the emerging use of analytics in campaigns, and the limits to their use in everyday campaigning.

Inviting Participation, Losing Control

While the 2008 campaign was dubbed ‘the Facebook election,’ the Facebook that the Obama and McCain campaigns dealt with was a different version of Facebook than we know today. The social norms and affordances surrounding commenting had yet to be as popular and user-friendly as they became in the following six years. Sharing content among friends, for instance, was neither common nor made particularly easy by the platform. The 2008 Obama campaign did deal with comments in its MySpace page, but the population of users there was much fewer in number than contemporary social media or commenting sections, and therefore the risk of allowing vitriolic comments (or those that were supportive, but inappropriate) was not as great as it is now. Within Facebook, the number of user-generated comments grew exponentially with each election cycle since 2008, as commenting became a dominant social practice on the platform. In 2010, a candidate running for a close Senate race was likely to receive one to two dozen comments per social media posts. For example, Alexi Giannoulias, Democratic candidate for the Senate in Illinois had an average of 13.50 comments per post, with the highest numbers coming from posts specifically requesting comments. Four years later, a comparably competitive Senatorial race in New Hampshire resulted in hundreds of comments per post, with the highest numbers coming from posts specifically requesting comments. Four years later, a comparably competitive Senatorial race in New Hampshire resulted in hundreds of comments per post, with the highest numbers coming from posts specifically requesting comments.
to see the strategic, community-building value of encouraging the public to comment and hold discussions within their platforms. To facilitate this, campaigns even encouraged feedback, asking supporters how they felt about issues, for feedback on advertising spots, and polling on policy questions (personal communication, May 19, 2011). While campaigns had no intention of allowing feedback to influence their strategic decisions or issue stances (or even that they would have time to comb through the answers), they saw benefit in asking citizens to talk back.

Encouraging citizens to speak up and talk back to campaigns might be good for ideals of deliberative democracy, but it posed a problem for campaign staffers who wanted to control the message. While campaigns saw that deleting citizens’ comments on their Facebook posts or blog comments was dangerous and not strategically beneficial, staffers disagreed on how else they should shape user contributions. In 2010, Facebook allowed administrators of campaign pages to control whether people could make direct posts to a candidate’s wall, who was able to comment on the campaign’s post, and which posts visitors would see first – posts by the campaign, the campaign and the public, or just the public. As social media platforms offer an array of controls, conversations about what choices to make have divided campaign staffers within as well as across campaigns. Exactly how much control was the campaign willing to let go of, and what leeway should the public be given in their commentary, input, and criticism of campaigns? As campaigns developed on-the-fly answers to these questions, the new strategic opportunities also exposed an unforeseen rift between staffers.

Consultants saw opening forums like commenting sections on Facebook and campaign blogs as beneficial not because of the intrinsic value of open, democratic spaces, but because of the potential downsides of closed spaces, and the consequences of being perceived as untrustworthy and inauthentic. One digital director stressed these downsides, saying, ‘people would begin to hate that if you [censored lots of content]. You don’t want to do that. People will talk about that’ (personal communication, May 19, 2011). Yet another communication director described the backlash from citizens that deletions caused. ‘They came back stronger, we learned not to do that quickly’ (personal communication, May 20, 2011). Although fear of downsides of exerting control were dominant, some staffers – largely those hired into newer positions on Digital teams – also argued for the moral value of leaving platforms’ commenting sections open and uncontrolled. As one digital staffer explained, ‘I come from the sort of generational culture, the tech culture, whatever that believes in openness and more transparency’ (personal communication, June 9, 2011).

Such disagreements became catalysts for organizational rifts between two of the major players within campaigns: Communications and Digital teams. The digital director quoted above contrasted his view specifically with that of his Communications counterparts, adding: ‘whereas the comms shop comes from the opposite culture: “Don’t say anything unless you have to”’ (personal communication, June 9, 2011). These disagreements were not only the purview of local campaigns, nor did they resolve themselves after a chaotic 2010 election; the 2012 Obama campaign was also plagued by them, despite its widely lauded digital strategy. As detailed in post-campaign journalistic debriefs, Obama’s digital team clashed with their communications counterparts over this very issue (Madrigal, 2013). Even as European campaigns tend more toward the broadcast model of communication within social media platforms, the fact that comments are becoming a part of the social fabric of the platform itself make this issue unavoidable. While stronger norms of civility and deliberation may provide Europeans with less of a threat to control, there is little reason to think they will not deal with the same issues and navigate
the internal divisions those choices are likely to reveal.

Inviting participation from volunteers eager to help campaigns also held the potential for problems, even as they took action that aided the campaign. As campaigns dealt with the problems associated with relinquishing control of their social media spaces, one productive strategy was seeking out volunteers to take on opposition in public forums and commenting spaces, sometimes going as far as to call them ‘ambassadors’ and give them a more meaningful, though symbolic, place in the campaign (personal communication, March 4, 2011; personal communication, June 22, 2011a). Another communications director described this as especially helpful if people from the opposition got heavily involved, saying ‘We’ll immediately go into full recruit mode for getting more of our like-minded people to join the page to balance it out’ (personal communication, June 22, 2011b). While these tactics were productive and saved campaigns time responding, they also raised concerns of volunteers going off message, and staffers’ anxiety about volunteers staying on message were constant. Such concern over well-meaning volunteers’ ability to stay on message or allow campaigns to control engagement tools they have created is not unfounded. In 2008, technically-savvy and politically-active Obama supporters supplemented the campaign with grassroots-created websites, social media posts, YouTube videos and more. Although these efforts generated publicity, showcased the dedication and enthusiasm, and held the potential to persuade and motivate voters, they also were outside campaign control and thus causes of concern for the campaign and its goals of ensuring a cohesive message. In May 2007, the Obama campaign took over the MySpace page for their candidate, much to the dismay of the grassroots supporter, Joe Anthony, who had run the page for two years. Following a legal dispute over the page’s ownership, the campaign was ultimately left with control of the official page, but none of the followers Anthony had amassed (Sifry, 2007). In 2016, grassroots supporters of Senator Sanders had similarly created organizing websites, such as FeelTheBern.org, which links back to the official Sanders campaign site to facilitate donations, volunteer efforts, and information about upcoming Sanders events, but is not affiliated with the campaign, or any supporting PACs.

Public Platforms and Changes to Interfaces

The landscape of digital tools that campaigns can enlist is overwhelming. From tools to procure and analyze data to social media platforms that connect directly with potential voters, campaigns can choose from a wealth of options that include campaign-developed proprietary tools (e.g., My.BarackObama.com), purchasable, off-the-shelf software packages that sometimes also include consulting help (e.g., NationBuilder, CiviCRM, Salsa Labs, etc.), or publicly available, privately-owned platforms like Twitter, Facebook and Wordpress. Increasingly, campaigns are paying for software to record and organize data that will improve their persuasion and mobilization efforts, but popular social media platforms are still vital to all campaigns because potential voters already spend time within these spaces. Moreover, the economic realities of races below the presidential level means that most campaigns are reliant on social media tools. As these platforms are privately owned and controlled, campaigns are unable to control what data, controls, and affordances such platforms provide them.

By now, the public is generally aware that social media platforms use algorithms to filter content and provide more relevant results to users (Gillespie, 2014, as well as in this volume). As a result, campaign consultants often apply strategies to ‘game’ the algorithm and make their posts visible to a higher number of their followers. While the specifics
of these algorithms are proprietary, some variables are known to be important, enabling consultants and staffers to learn what content the algorithm is known to reward. With every major change in the algorithm comes a flurry of concerns and discussions on consulting listervs and trade publications, writing on how best to post content in this new configuration. A prominent recent example of this are the changes to Twitter’s once-purely-chronological algorithm. First, the platform added content ‘favorited’ by others to a user’s feed, then it introduced ‘Recaps’ or ‘While you were away’ – an algorithmically-curated collection of tweets the user is likely to enjoy, based on popularity of a tweet, the account tweeting, and the engagement between the user and other accounts. As this algorithmically curated part of Twitter became more widely distributed by Twitter, consultants were forced to consider the value of creating content that will draw engagement versus constant tweeting (relevancy over recency). While we have yet to see how campaigns will respond to this change, the very fact that campaigns are reliant upon a privately owned platform and not in control of its affordances highlights the problem of unforeseen consequences of social media adoption. More visible changes to social media platforms can also ‘disrupt’ campaigns’ strategies and abilities, and force them to change their practices.

In 2011, Facebook, for example, changed its user interface from what had been a more text-heavy layout that highlighted many of users’ (and friends’) posts at the same time to what the company called ‘Timeline,’ an image-heavy design. This change did more than just move all users into an interface that afforded visual content; it changed campaigns’ ability to control where and if users could post comments and information on official campaign pages. Before the 2011 change, campaigns could choose to allow users to post on their page, could specify whether all users or just fans could do so. Moreover, if campaigns allowed fans or users to post, they could also choose from three options of how visible those posts would be, in effect, allowing campaigns to discreetly control how visible citizen-created content would be. Campaigns could set a default view to show only their own posts, those of only users, or all posts. Thus, a campaign could allow anyone to post content to their own page, but also make it so audiences would have to flip through a filter in order to see everyone’s posts. It could also prevent users who were not fans from commenting on other posts or creating their own post.

When Facebook made its change to the Timeline layout in 2011, these options were reduced. In this new layout, campaigns still had the ability to limit whether users could post directly to the page, including limiting whether users who had become ‘fans’ or ‘friends’ of the page could do so, or if anyone could. However, campaigns lost the ability to limit users’ comments on posts the campaign published themselves. While the campaign can delete or hide individual comments, there is no backend control of limiting comments in the first place; any post a campaign makes is open to the public for commenting. Additionally, the design of the Timeline layout meant that campaign-produced content was front and center, while visitors’ or fans’ posts were relegated to a side column. Thus the change allowed campaigns to highlight their own content, but simultaneously prohibited campaigns from exerting a type of discreet control over the comments on that content.

**Limits to Data and Analytics**

Data and analytics have long been useful and necessary aspects of campaigning, from the use of local and national polls to gauge public opinion to dial tests used to measure reception of particular messages or arguments, to the micro-targeting practices discussed previously. While these uses of data to craft persuasive messages are
commonplace, in the years following the 2008 presidential election, discussions of the importance of ‘data-driven campaigning’ and the importance of a ‘culture of analytics’ have gained traction among political professionals working in both advocacy and campaign environments. In many ways, communications offices have made leaps and bounds in the time between 2010 and 2014. In 2010, campaigns were only on the cusp of making sense of the new digital tools at their disposal. Campaigns rarely used analytics to test messages or develop strategy, and they were struggling with the basics, such as how to increase circulation in new social media spaces or reach desired populations. In one example, a communications director of a major Congressional campaign found himself confused and frustrated upon seeing that he could not target direct messages to citizens because he incorrectly assumed that the affordances of Facebook advertisements could be used for public posts and messages as well (Fieldnotes, September 1, 2010). As a result of this inability to target messages, he questioned the usefulness of the entire platform. Another Chicago-area campaign that was in an extremely tight race described being so concerned with gaining Facebook friends that a member of the communications/digital team purchased additional friends. This strategy held many problems, not least of all that it failed to reach actual voters, and staffers had to subsequently spend additional hours manually deleting the campaign’s Facebook page of fake friends (personal communication, March 27, 2011).

Here, social media benchmarks that seemed important to campaigns directly impeded other strategic goals.

Even in 2010, those in federal races were using targeted email lists, and occasionally deployed an A/B test for special occasions or initial website development. In one case, a campaign tested three options to determine the content of a splash page that preceded the campaign website during the final two weeks of the campaign, but that was their only A/B test of the final month of the campaign (Fieldnotes, October 18, 2010). Generally, communications directors for Senate and Congressional campaigns were well versed in targeting email lists, but only those at the Senate level were testing those messages in order to determine what type of subject header, content, and images were best at gaining attention or mobilizing constituencies (Baldwin-Philippi, 2016).

Much has happened since 2010 – analytics are increasingly automated, or ‘baked in,’ and displayed to the messages’ creators with clarity, simplicity, and aesthetic appeal. Without much effort, staffers can use email management systems to catalog what audiences do with the messages, collecting data on whether an email was opened, if it was shared in other social media spaces, and/or what links were clicked. Likewise, domain hosts and free analytics provide basic web traffic data for campaign websites that also tells campaigns where visitors are located, and what linked them to the site. Campaigns gravitate toward these tools, even if they are not always deployed in statistically rigorous ways, largely because they are easy to access and interpret. Because time is always of the essence in a campaign, data that update immediately and can be quickly interpreted are of great benefit. One communication consultant explained how baked-in analytics are the most practical in the time crunch of a campaign, saying, ‘I don’t have to take time to set something up before posting a message […] I can look at the numbers when I have the time, and still use that [finding] the next time we need to post a message’ (personal communication, December 3, 2014). Others echoed the benefit of their immediate presence and the obvious usefulness, with one noting ‘They’re right there! You can just take a quick look and see what type of messages perform well’ (personal communication, December 18, 2014).

Notably, these analytics focus on popularity, highlighting the amount of impressions content makes, how many times it is liked
or favorited, and how often it is shared about other metrics. Visually, the native analytics of Facebook overwhelmingly emphasize these very measures. In each of these, the number of likes, the reach (total impressions), and ‘engagement’ (a combination of likes, comments, shares, and how many times links are clicked) are provided. These engagement analytics begin to provide insight that is deeper than popularity of topics or issues, but also require more advanced strategies in combination with other forms of analytics to understand if other actions, such as donating or signing up for a newsletter, are taken. Facebook highlights notifications specifically for likes and shares and bar graphs that visually represent the amount of people reached. While it also measures additional actions such as engagement, or if audiences click on links provided, the system itself cannot track analytics of more action-oriented behavior, such as which users donate once a link is clicked, or how long they stay on that page. Twitter, on the other hand, provides people with an overview that is more concerned with how the campaign as a whole is doing, highlighting how well tweets are doing over multiple weeks, rather than only focusing on particular messages. Although retweets and favoriting mirror the drive for popularity seen in Facebook’s analytics, Twitter’s engagement metric is a sum of all replies, retweets, and mentions, and speaks more to how much a campaign is being discussed by the public of users than merely what type of content is popular. While Twitter provides data on a user’s audience through a ‘followers’ section of their analytics, that information is a click deeper than analytics displaying an account and individual tweet’s impressions, retweets, favorites, or an account’s mentions.

Just as the material constraints of privately-owned platforms impacted campaigns’ ability to control and sensor public commentary, they also constrain campaigns’ ability to work with analytics. The data that platforms like Facebook and Twitter automatically provide to users – especially the data that they choose to visually represent and make the most easily interpretable – will be the data that campaigns turn to, and that therefore drives content creation. Popular social media analytics packages such as SproutSocial, CrowdTangle, Attentive.ly, and so on, provide more complex metrics of ‘engagement’ than those baked into social media platforms themselves, like Facebook Insights. In these third-party tools, algorithms rank combinations of measures such as likes, shares, attention, users’ networks, and so on, and sometimes compare them with other similar pages. These uses of analytics are certainly an important beginning step into testing messages and engaging analytics more rigorously, but their limited use results in attention to the type of content that encourage campaigns to focus on messages that are popular, rather than mobilizing.

**IMPLICATIONS AND CONCLUSION**

Campaigns’ use of social media was solidified in the wake of the 2008 Obama campaign, and this use has continued to increase in the international context. Currently, the parliamentary context breeds widespread use of social media by party accounts, approaching that of candidates in the US case, and individual politicians’ are increasingly turning toward social media campaigning. Although most campaigns’ and parties’ use of social media involves the unidirectional broadcasting of messages, there is also a substantial minority of campaign strategy designed specifically around using social media to mobilize individuals to take both online and offline action. Beyond the traditional mobilization-oriented campaign goals of increasing voter turnout, fundraising, attendance at campaign events, a new goal of getting supporters to participate in online discussions and deliberations has also emerged. Overall, early research gives reason to be hopeful that engagement with
campaigns on social media leads to further, deeper political action as well. However, social media do not provide unmitigated aid to campaigns; as this this chapter points out, there are often unintended consequences to adoption. This chapter points to three such instances of unintended consequences of social media adoption: (1) the rise of citizens who talk back and loss of campaign message control; (2) the decision to use privately-created platforms such as Twitter and Facebook, even when necessary, limits campaigns’ ability to control messages and understand data; (3) the difficulties posed by the drive toward data and analytics and the default options that campaigns gravitate toward.

This assessment of unforeseen consequences serves as neither an optimistic nor pessimistic assessment of the future of campaign communication and digital democracy. Rather, it points to the possibility of both. Sometimes, as was the case with campaigns’ unraveling ability to control public feedback, actions taken by staffers and changes in campaign technology lead to a rupture in the tight control campaigns have long wielded over citizens. What campaigns see as a loss of control is, to citizens, a space that is open and encourages them to voice their opinions, provide support (and dissent) for policies and candidates, and give feedback on political information. It is true that the content of this feedback may not reach the high standards of reasoned, rational, and consensus-oriented debate that are indicative of deliberative democracy. That said, deliberation is not the only democratic ideal that can be gained from speaking on political issues. The act of giving voice to political beliefs and stances via social media necessarily involves engaging others in your social network in political speech and information, and is itself participatory, and part of the ladder of engagement. Even as some campaign staffers have found such spaces dangerous and desired to reduce their availability, campaigns’ decisions to engage with citizens via the popular social media platforms of Facebook and Twitter have left them hamstrung. We can surely consider ways to improve the potential for voice-giving in these spaces, but the particular platforms of Facebook and Twitter have forced campaigns to deal with – and even encourage – citizens’ voices in ways that are unparalleled.

Other campaign strategies offer less room for optimism. As campaigns routinely turn to social media platforms, they also embrace the analytics that the platforms provide in order to assess how successful the content they create has been, and anticipate what content will be successful in the future. Many of the ways campaigns use this data – especially at the level of local and state-wide campaigns – incentivize simplistic views of campaign goals that also motivate a turn toward superficial forms of democratic engagement. As these analytics highlight popularity – how many individuals a message reaches, how many likes, favorites, or shares it gets, the number of comments rather than their content, and so on – social media platforms motivate the production of content that will bring popularity, rather than alternative, more participatory options, such as mobilizing citizens or identifying new opinion leaders. While creating popular content could motivate supporters to deepen their commitment, the fact that these metrics do not highlight or provide clear, legible data on such effects limits campaigns’ ability to see mobilization as a tangible outcome of social media messaging. Further, because popular content is not always that which is the most successful at persuading or mobilizing particular acts of political participation like donating, volunteering, or turning out at events, what counts as visible ‘success’ within the world of social media content may not be the most important to campaigns’ immediate needs.

These unforeseen consequences are occurring as social media platforms play an increasingly widespread role in campaigns – popular standards like Facebook, Twitter, and YouTube are now near-ubiquitous. Campaigns experiment with emergent platforms such as
Snapchat and Periscope and even their own mobile applications; more time, money and staffers are devoted to the messages produced for and circulated within and across social media platforms. As these tools continue to be important sites of engagement for campaigns, inspection of their ability to affect the types of participation allowed and encouraged is necessary. This chapter is not meant to slow the adoption of social media campaigning – not only will campaigns continue to rush toward and even develop new tools that might give them the slightest edge, but I am generally hopeful for the democratic opportunities offered by the vast majority of such tools. Instead, this is a call for consideration of the strategic choices campaigns might be making in the moment and for deeper attention to the long-term consequences of technology adoption and strategy development. This is especially important as international campaigning may be driven to catch up with the US cases that currently drive most innovation, and as US campaigns continue to develop new tools that will be improved, adopted, and deployed in campaign cycles to come.

Notes

1 Many have written accounts of the history and evolution of these aspects of campaigning, which are due far more consideration than this chapter is able to give. For accounts of the emergence and changing practices around campaign websites, see Stromer-Galley (2014), Foot and Schneider (2006) and Vaccari (2013). For discussions of the emergence of campaign database technologies in the US, Philip Howard (2006) provides an overview of tools used across electoral and advocacy campaigns to better target members of the public and Daniel Kreiss (2012b) provides an account that charts the practice of infrastructure building within the Democratic Party. Colin Bennett (2015) has detailed emerging trends in voter surveillance and data collection in the European context.

2 Many more books have been written about the 2008 Obama campaign’s social media strategy. For information on the various types of message created for various social platforms, see Harfoush (2009). For a discussion of data and analytics, see Issenberg (2012). For a study of the race that contextualizes the campaign’s use of media within more traditional concerns of political communication such as candidate narratives and voter behavior, see Kenski, Hardy and Jamieson (2010).

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