“Technology is a Commodity”:

The Internet in the 2008 United States Presidential Election

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Abstract

The role of the Internet as a tool for participation and organization has been considered the most important innovation in the 2008 U.S. presidential campaign and one of the key strategic factors in Barack Obama’s conquest of the Democratic nomination and the White House. This paper analyzes e-campaigning in the 2008 election through data drawn from qualitative interviews with thirty-one consultants and operatives who were involved in the presidential race. Rather than adopting a techno-centric perspective, our interviewees acknowledge that several contextual factors enhance or hinder the effectiveness of online tools, such as the message of the campaign, the candidate’s personality, and his or her ability to generate enthusiasm in the electorate, together with the campaign’s strategic prioritization of grassroots electioneering. Technology is seen more as an efficient channel of preexisting motivations and loyalties than as a driver of these attitudes. Moreover, while the Web has often been characterized as presenting campaigns with a dilemma between top-down hierarchy and bottom-up spontaneity, Internet professionals and operatives argue that contemporary e-campaigning tools can help achieve both goals and breed a hybrid organizing model that reconciles control and empowerment through the skillful use of individual data. These findings have important implications regarding the strategic and organizational dynamics of contemporary campaigns and the role of citizen participation within them.
Unlike the ultimately failed campaigns of Howard Dean in the 2004 Democratic primaries, of Ned Lamont in the 2006 race for Connecticut Senator, and of Ségolène Royal in the 2007 French Presidential election, the 2008 United States presidential contest has finally crowned a winning “Internet candidate.” There is little doubt that the new media were instrumental in Barack Obama’s victories in the general election and, especially, in the Democratic primaries, where he defeated the seemingly unbeatable frontrunner Hillary Rodham Clinton. The 2008 election was exceptional for the amount, intensity, and depth of online political engagement: a Pew Internet and American Life Project report (2009) found that 74% of Internet users and 55% of the U.S. adult population went online to get information about, or participate in, the Presidential campaign; moreover, the study found that the Web is now second only to television as a source of news and competes on an equal footing with newspapers. The new media have also become important sources of electoral funds and volunteers: in 2008, nine percent of Internet users reported having gone online to make a campaign donation, and six percent claimed to have signed up as volunteers on a candidate’s Web site. Moreover, there was a remarkable gap between Obama’s and Republican candidate John McCain’s supporters in terms of their propensity to engage in various online political activities: while 15% of Obama voters donated money online, only 6% of McCain voters did; whereas 11% of Obama voters signed up online as volunteers, only 4% of McCain voters did. Among Internet users, 30% visited Obama’s campaign Web site, while 21% went on McCain’s; among email users, 37% received messages signed by Obama and 24% by McCain (Pew Internet & American Life Project, 2009). Thus, not only have the 2008 elections witnessed the integration of the new media into the mainstream of campaigning in the United States, but they have also shown that the Internet can constitute a sizeable competitive advantage for candidates who take advantage of its potential.

This article analyzes the 2008 U.S. Presidential race as a significant case study in the adoption of technology to enable citizen participation and enhance campaigns’ ability to build networks of supporters to deliver their messages. The next paragraph summarizes the theoretical debate regarding the impact of the Internet on political processes and campaign dynamics.
Subsequently, we discuss the research questions and methodology of this study, which draws on qualitative interviews with thirty-one consultants and operatives involved in the 2008 online campaign. We then present our findings, which shed light on the contextual, strategic, and organizational conditions that mediated the impact of Internet campaigning in the 2008 election, as well as the changes in power relationships elicited by these dynamics. Finally, we will discuss the implications of the evidence presented here for citizen participation and contemporary campaigning and will suggest directions for future research.¹

Conflicting Paradigms and Organizational Tradeoffs in Online Politics

Research on Internet campaigning has been conditioned by the clash of two paradigms: technological determinism, which claims that technologies are an autonomous force that shapes society, and social determinism, which sees technologies as fundamentally neutral tools that are molded by social forces. These two approaches provide conflicting answers to the questions of whether and how the new media can produce transformations in the political landscape. While supporters of technological determinism claim that the Internet is bound to redefine power relationships and, in the process, restructure democratic polities, advocates of social determinism observe that online tools are inscribed in a context where social forces mediate the potential impact of technologies, thus favoring incremental changes while hindering more fundamental transformations (for a discussion, see Chadwick, 2006, pp. 17-21). Indeed, in the literature on Internet politics the debate between technological and social determinism first emerged as a normative clash between optimists, who claimed that the new media would diffuse power, increase

¹ Data analyzed in this study will be made available at Dataverse (http://dvn.iq.harvard.edu/dvn/dv/jitp) beginning on November 1, 2010. The data will be provided immediately for replication purposes upon request.
party competition, and empower non-elites vis-à-vis elites and proponents of normalization, who argued that the Internet could not alter long-standing power balances and dynamics (see Bentivegna, 2006). While scholars have strived to overcome these dichotomies, their heritage is still apparent in many research subfields.

In this respect, the literature on Internet campaigning has more often sided with social rather than technological determinism. Scholars have recognized that the diffusion of e-campaigning tools is not uniform across all parties and candidates, but depends on various contextual factors related to both structure and agency (Foot & Schneider, 2006; Gibson, Nixon, & Ward, 2003). Broader assessments of online politics have so far concluded that the Internet has not dramatically altered the basic dynamics of political competition and participation (Margolis & Resnick, 2000). However, the 2008 election might be seen as a challenge to these theories, as Obama relied heavily on the Internet for fundraising and organizing purposes, raising as much as 500 million dollars online, collecting 13 million email addresses, and using his social networking platform to recruit two million volunteers, who in turn helped organize about 200,000 offline events (Vargas, 2008). Never had the Internet benefitted a major candidate as much as Obama, even by comparison with the significant role it played in the 2004 cycle (Vaccari, 2008). The success of the Obama e-campaign raises the question whether the new media simply channel preexisting attitudes and campaign dynamics, or, under certain circumstances, drive political processes that would not have otherwise occurred, possibly altering the strategic incentives of campaigns as a consequence.

Although communication tools are socially constructed by political institutions and actors, it is also clear that online electioneering platforms now present candidates with opportunities that are more relevant, and potentially impactful, than they were in the first age of Internet politics. In other words, the two conflicting paradigms of technological and social determinism still need to be reconciled if we are to comprehend the political dynamics brought about by the new media: as Chadwick explains, “The Internet is an inherently political set of technologies, but its politics are subject to decisions made in supremely political contexts” (2006, p. 21). It is thus necessary to
better understand the complex context within which online campaigning takes place and to assess under what conditions these tools can drive or channel political processes.

Another aspect on which the literature on e-campaigning has often focused is the relationship between Internet adoption and organizational power, pressures, and structures. With respect to election campaigns, Foot and Schneider have hypothesized a dynamic of mutual influences by which “Web campaigning practices both manifest campaigns’ organizational practices and (re)structure those organizational practices” (2006, p. 18). Focusing on political structures writ large, Bimber has argued that information abundance is eliciting “postbureaucratic forms of politics” based on “the substitution of information infrastructure for organizational infrastructure” (2003, p. 21). Subsequently, Bimber and his colleagues have argued that the dynamics and cost-benefit calculations of collective action might be transformed so that “the act of organizing may be decoupled from formal organization and the transition of private interests and resources to public domains of collective activity may be more easily accomplished than in the past” (Flanagin, Sthol, & Bimber, 2006, p. 30). Thus, political organizations built around formal bureaucratic and hierarchical principles would be increasingly challenged by informal, flexible, and fluid structures arising from information networks. As a result, the collective action space is expected to be more hospitable to entrepreneurial organizations, which leave their members relatively great leeway to define the goals and terms of their efforts, than to institutional groups, which impose strong constraints and limitations on their members. Moreover, the current informational environment is thought to allow organizations to develop differentiated modes of collective action, leaving their “footprints” in various types of efforts, both institutional and entrepreneurial, personal and impersonal, thus giving way to multidimensional and complex structures (Flanagin, Sthol, & Bimber, 2006, pp. 42, 49). Elaborating on this framework, Chadwick (2007) has noted that parties, interest groups, and social movements are imitating each other’s mobilization techniques and in the process are breeding hybrid organizational types. The creation of “digital network repertoires of collective action” (Chadwick, 2007, p. 286) – which allow for
greater and more diversified opportunities for participation, produce and sustain distributed trust among members, fuse subcultural and political discourses, and create and build upon sedimentary online networks – has resulted in an increase in grassroots influence on parties’ and interest groups’ organizations which has made them more similar to social movements than in the past and has enabled them to integrate, and easily switch between, different modes of political action. However, Chadwick is cautious as to whether such hybridity “is going to continue to open up traditionally hierarchical organizations, especially political parties” and suggests that, rather than being fully adopted within all units of political structures, participatory practices might be narrowly channelled to particular organizational subunits or to specific social groups without significantly affecting the overall balance of power within political organizations (Chadwick, 2007, p. 297).

Caution is indeed warranted as institutional political actors have been found to be quite resistant to bottom-up pressures. With respect to electoral organizations, scholars have highlighted the contrast between the command-and-control logic of campaign structures and the participatory ethos of information and communication technologies (Löfgren & Smith, 2003). Parties and campaign committees have been cautious in engaging with their supporters online and reluctant to ceding control over their message (Stromer-Galley, 2000). As Foot and Schneider (2006, p. 6) write,

> While campaigns want to involve a large number of supporters, they also want to establish the terms of that involvement. They desire to multiply their resources by mobilizing supporters to promote the candidate in the supporters’ sphere of influence, but they also want to manage and track these promotional activities.

Similarly, Chadwick notes that, while early assessments claimed that “the Internet may increase grassroots control over candidates and party leaderships, resulting in new, participatory campaigns […] that depart from the hierarchical structure typical of the catch-all party” (2006, pp. 146-7), in
reality “there are still many reasons why increasing grassroots influence over party leaders will be difficult to achieve” (2006, p. 172) due to the persistence of asymmetrical power relationships outside the online realm that are too pervasive and influential to be subverted by any reconfiguration of influence elicited by the new media. Even Howard Dean’s campaign, hailed by many scholars as a path-breaker in organizational hybridity, ultimately failed to reconcile the “top-down ‘war-room’ style management and bottom-up ‘netroots’ mobilization” (Chadwick, 2007, p. 289).

A related problem that may discourage campaigns from adopting purely bottom-up organizations powered by dialogic, peer-to-peer communication is that, as Nielsen (2009) has pointed out, the proliferation of messages and messengers allowed by low-cost information technologies can create various types of “labors” – such as overcommunication, miscommunication, and communicative overload – that increase the transaction costs in political organizations and thus impede rather than enhance their functioning. Nielsen specifies that activists and organizations are more likely to experience these problems if they are (a) heterogeneous, (b) engaged in long-term rather than one-shot activities, and if they lack (c) organizational protocols for communication and (d) pre-fashioned infrastructures and external structures that aggregate and channel their communications (Nielsen, 2009, p. 278). In this respect, a centralized organization can be expected to help achieve all these goals, as a degree of top-down control can (a) reduce heterogeneity by assigning volunteers to internally homogeneous groups and providing them coaching and shared values and norms, (b) “unpack” the broader goals of the organization into manageable and scalable action items, (c) define standard protocols for communication, and (d) build and maintain a trusted, centralized communication infrastructure, or direct members to specific external platforms. As Nielsen (2009, p. 279) observes, the degree to which political professionals will embrace Internet-enhanced volunteer organizations depends on their ability to maximize their benefits while minimizing their costs. One way to achieve this goal is to adopt organizational solutions that limit transaction costs by better directing and controlling the communication flow in both directions.
Moreover, the outcome of online campaigning does not necessarily result in a vertical redistribution of power. As Ward and Vedel argue, “Simply providing electronic tools for participation is not the same as actually empowering members” (2006, p. 217). One of the reasons is that political elites can take advantage of Internet applications to selectively direct supporters’ actions while claiming to be engaging them in democratic practices. From this perspective, Howard (2006) has suggested that new media campaigns can exercise innovative forms of control over supporters through data mining technologies that allow tailoring messages to different audiences according to their online and offline behaviors, recorded in a large and constantly growing “data shadow.” Consequently, the practices of citizenship are increasingly managed as anticipated responses to carefully crafted stimuli from political elites. One implication of these findings is that political organizations should be less wary of losing control in the online landscape given that they can harness database technologies to segment their supporter universe and selectively communicate with isolated groups according to their preferences and dispositions. Another implication is that even those activities that members perceive to be entrepreneurial and self-managed might be subject to a significant degree of control from political organizations, as the presentation of opportunities to participate online can be fine-tuned by information-savvy campaign managers according to their own priorities.

Thus, as the Internet audience continues to grow and as online electioneering achieves increasing political relevance, campaigns are under pressure to develop organizational models that reconcile both their need to access valuable resources through online engagement and their desire to control such engagement. While it seems clear that the resulting organizational arrangements will likely be a hybrid of top-down and bottom-up practices, it is an open question where the equilibrium point is bound to lie and how far campaigns will be able to stretch their practices, thus leaving “footprints” on different modes of interaction and engagement in collective action, without (fear of) losing internal consistency and manageability. As the field is still relatively young and both its producers and users are constantly refining their approaches and practices, these tensions
continue to elicit behavioral and structural changes that research needs to constantly assess in order to fully account for the empirical realities of online politics. One possible way to achieve this goal is to move beyond the analysis of Web sites and other aspects of the supply of Internet electioneering and to observe the organizational field, where e-campaigning producers make decisions based on cognitive and operational schemata that are shaped by the context but also mould it by selecting some technological affordances and refraining from others. This was the purpose that informed our methodological choices, to which we now turn.

Research Questions and Methodology

In order to advance our understanding of the issues summarized above, this study aims at answering two research questions. The first has to do with whether the Internet can be considered a channel of preexisting political dynamics or a driver of these processes, that is, whether it is a set of tools that in and of themselves can produce political transformations, or whether its impact depends on other contextual forces, and, in such case, which factors can be hypothesized as mediating the effects of Internet electioneering. The second question deals with whether and to what extent the successful adoption of online campaigning techniques requires and promotes the development of hybrid organizational structures that blend top-down control and bottom-up spontaneity, and what mechanisms enable such arrangement. The 2008 U.S. presidential election offers a valuable opportunity to address these issues, as the Obama Internet campaign was able to tap into unprecedented levels of energies and resources, thus casting doubt on the idea that the new media can merely be a channel rather than a driver of political support, and its organization was apparently based on a more participatory model than had previously been the case in major-party American politics.

As these questions deal primarily with the meso, organizational level, the perspective from which they are best addressed is that of the e-campaign specialists, an increasingly numerous and
recognized cadre of political professionals and operatives who direct the adoption of online
electioneering tools. It is through their decisions and methods that e-campaigning techniques are put
into practice and acquire meaning for citizens (see Foot & Schneider, 2006, p. 13). The method of
qualitative interviewing (Rubin & Rubin, 2005) is particularly well suited to investigate these
issues, as it allows us to extract data not only on the techniques and behaviors of these experts, but
also on their mindsets and operational habits.

In order to fully understand the philosophies, methods, and practices of online campaigners
in 2008, we defined our target population as: (a) all consultants and operatives who had a high-
profile role in the online campaigns of presidential candidates, both in the primary and general
elections; (b) directors of online communications for the two major parties; and (c) notable figures
in the field. In our analysis, we distinguish between political consultants, who work for professional
consulting companies and make a living by selling products and expertise to candidates, parties, and
interest groups (Thurber, 2000) and political operatives, who are hired as part of the staff of a party
or campaign. In the short term, the two roles may overlap, as when a professional takes a position in
a campaign staff, but in the medium term these constitute two different career paths. Based on
information published on official campaigns’ websites and various news sources, we then
constructed a list that included the top e-campaign leadership for all candidates and parties. Because
Obama’s Internet team – which reportedly consisted of about thirty people, not including various
employees of a contracting company – was much larger than all other candidates’, consultants and
operatives who worked in his campaign were overrepresented in our sampling frame and thus are
also overrepresented in the resulting sample. McCain’s Internet team was also larger than most
other primary candidates’, thus it, too, is overrepresented in our sample, although to a much smaller
degree than Obama’s. The final sampling frame consisted of 66 total consultants and operatives; we
then contacted all of them via email, social networking sites and, when possible, telephone;
prospective interviewees were contacted a maximum of five times before excluding them from our
sample. Twenty-eight of 66 people, or 42% of the sampling frame, agreed to be interviewed;

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furthermore, during interviews we adopted a snowball-sampling technique by prompting suggestions about other informants that could be interviewed for this research, which produced 6 more names, of which 3 agreed to be interviewed. Thus, from a sampling frame of 72 elite informants, 31 total interviews were conducted, for a response rate of 43%.

Our sample includes 18 political consultants (9 Democrats, 8 Republicans, and one Independent) and 13 political operatives (7 Republicans and 6 Democrats). Our sources are thus remarkably well balanced not only between the two major parties (15 Democrats, 15 Republicans, and one Independent), but also between consultants and operatives, and between the two major parties within these two groups. The complete list of sources is shown in Table 1. As was previously indicated, the fact that twelve of our interviewees worked at some point with the Obama campaign is not as much a source of bias as a reflection of the reality that Obama employed a significantly larger online staff than other presidential candidates. While our focus was mostly on new media, we relied on a wider field of experts in order to assess the Internet’s impact on campaign dynamics. Including perspectives from departments other than e-campaigning, such as field organization and central campaign management, minimized the risk of overestimating the role of technology and neglecting other crucial organizational and political variables.

The interviews were conducted between November 2008 and April 2009 and lasted on average about an hour each. All but two conversations took place via phone or Skype; interviews with Ralph Benko and Joe Rospars were conducted in person in New York City. The interviews were conducted based on a semi-structured questionnaire, half of which was identical for all sources, while one-fourth was designed to allow interviewees to provide knowledge that was unique to their particular skills and role in the campaign, and one-fourth was reserved to follow-up inquiries and questions that stemmed from the topics raised during the conversation. Information on
the questionnaire design can be found in Appendix A. Due to space constraints, it is not possible to include quotations from all interviewees in this article. Decisions on whom to quote were based on our assessment of the relevance of their viewpoints, as well as their representativeness of the opinions of the entire sample. Furthermore, we will provide summary statistics that illustrate the degree of agreement among our interviewees on the main findings of our study, as well as the frequency with which various issues were discussed and assessed.

In the next paragraphs, we first discuss the impact of the Internet on campaign dynamics, which our interviewees assess as being mediated by various contextual factors, such as the candidate’s popularity, a compelling campaign message, and the strategic centrality of grassroots communication. Secondly, we draw on professionals’ and operatives’ perspectives to analyze the organizational arrangements and mechanisms that emerged as a result of the integration of the new media in campaign structures. Finally, we discuss these findings and suggest their implications for future research on political organizations and citizen participation.

Channel or Driver? The Contextually Bounded Power of Internet Campaigning

The consultants and operatives interviewed for this study emphasize that the Internet cannot be seen as a “magic bullet” capable in and of itself of driving support and resources to a candidate. Although especially consultants, who compete in a developing industry eager for hype and recognition, could be expected to uncritically promote the power of the tools they design and sell, they acknowledge the complexities of Internet electioneering and refrain from technological determinism. Shedding light on the conditions they identify for the success of e-campaigning strategies can help us better understand which types of online applications will be prioritized by political actors, under what circumstances campaigns will be more likely to invest in this medium, and whether and how these transformations will change political organizations’ strategic incentives. In order to preview our key findings and to illustrate the degree of agreement among our...
interviewees about them, Table 2 shows the number of interviewees who agreed (fully or with qualifications), disagreed, or did not take position on nine assessments of online campaigning in 2008. These evaluations were based not on direct answers by the interviewees to specific questions, but on secondary analysis performed by the author on the contents of the conversations. As the data clearly show, there was a remarkable degree of concordance among the consultants and operatives interviewed for this study on all our main findings.

Insert Table 2 about here

Two main sets of contextual factors are cited by our sources as mediating the effects of Internet campaigning: one is related to content, the other to organization. With respect to content, the characteristics of the candidate and of the campaign message are seen as key to generating enthusiasm among supporters, which then evolves into a large following online. As the Internet is mostly a selective medium, where the possibility for candidates to attract an audience largely depends on users’ decisions rather than inadvertent exposure (Bimber & Davis, 2003), the success of e-campaigning is strongly related to the candidate’s leadership skills and message, as these quotes demonstrate:

Technology is really a commodity, […] it is enthusiasm for the candidate that drives people to act. The Internet is primarily a mechanism to develop the rapid distribution of enthusiasm for a campaign. If it is designed properly it enables the enthusiasm to propagate itself.
(Cyrus Krohn)

It’s more than just online tools, it’s more than just a fancy Web site that takes advantage of every piece of Internet technologies out there. At the end of the day campaigns are about
candidates and candidates deliver messages, and unless that candidate has a feel, you can Twitter all you want, it’s not going to make a difference. (Christian Ferry)

In these and other testimonies, “inspiration” and “enthusiasm” are the properties of candidates and messages most often associated with effective online campaigns. At the same time, various interviewees emphasized the importance of building trust and listening to supporters. Campaign professionals and operatives claimed that Internet tools thrive on a state of collective exuberance, more similar to the dynamics of social movements than to the attitudes commonly found among members of institutional political organizations. Various sources noted that movement-like dynamics similar to Obama’s campaign were in play with Congressman Ron Paul, the Republican candidate that attracted the largest Internet following during the 2008 primaries. Justine Lam, who ran Paul’s online operations, claims that “once Ron Paul declared his interest in running, a lot of people on the Internet were already rooting for him and spreading the word, so it was not like I had initiated a movement, it was already happening.” Paul’s online success can be related to the popularity, among his Internet followers, of his libertarian views, which suggests a communality of values with social movements emphasizing “do-it-yourself” citizenship and nonhierarchical arrangements (Chadwick, 2007, p. 286).

Remarkably, no differences emerged between the opinions of Democratic and Republican consultants and operatives in this area, as was the case for most of the topics addressed in the interviews. Overall, 28 interviewees agreed on the first two statements in Table 2; three consultants, while agreeing that the Internet is mostly a channel rather than a driver of political dynamics, nevertheless singled out fundraising as a partial exception to this rule, noting that the Web probably drove the increase in campaign donations observed in 2008, especially for candidates such as Obama and Paul. Joe Rospars thus argues for a finer distinction between dynamics in which the Web can be a channel and a driver:
I think when you have a job like mine it is useful to look at things and figure out where you can find an opportunity to be a channel and help make things more efficient and just be a connector, or where you can be a driver and put some new things in play, because it’s not all about being one or the other, there are different opportunities and different projects that fall into each category.

Since most of our interviewees claim that online campaigning requires movement-like effervescence among supporters to be effective, they tend to see the Internet operations they supervise more as conduits than as sources of political dynamics. Chris Hughes summarizes his job as being “responsible for channeling all the energy and enthusiasm of the Obama supporters into very real, tangible benefits for the campaign that would help achieve our success.” In a similar fashion, most sources point out that, although the Web might not have spurred the dynamics that motivated supporters in the first place, it crucially contributed to effectively collecting and directing these energies, as argued by Sam Graham-Felsen:

We knew there was just so much enthusiasm and energy out there, it’s almost like you could envision a rainstorm of supporter enthusiasm and what we tried to do was collect that enthusiasm, put out as many buckets as we could to collect that rain. […] We cast such a wide net, we put out so many buckets, that we had the sense that if you liked Barack Obama, we were going to make it almost impossible for you to miss the opportunity to get involved with the campaign if you wanted to.

E-campaign consultants and operatives thus suggest that candidates differ in their ability to take advantage of Internet electioneering, and that the same online tools might have a different impact depending on the candidate, the campaign message, and the level of collective energy mobilized by them. Thus, the incentives for politicians to engage in online campaigning might vary
depending on these political preconditions: as professionals and operatives working for certain candidates realize that their campaigns cannot inspire the movement-like dynamics that dovetail with effective online organizing, they might rationally decide to direct resources into other campaigning areas. Conversely, however, should the trend continue that has seen the new media achieve increasing relevance in U.S. campaigns, the ability to spark enthusiasm and inspire supporters online might become a factor to be reckoned with in the winnowing of candidates, to the same degree that the capacity to attract mass media coverage has been a fundamental prerequisite to evaluate the viability of any political contender over the last five decades.

The second aspect that professionals and operatives identified as relevant in the success of Internet electioneering is related to the campaign’s overall strategy. As claimed by Thomas Gensemer, “You shouldn’t start by investing in technology, you’d better start by investing in strategy.” Our interviewees pointed out that campaigns that heavily rely on grassroots supporters and on-the-ground activity are poised to benefit the most from online tools, provided that the Web is strongly linked to offline efforts. As claimed by Jeremy Bird, “the new media is a tool, not the engine, […] in and of itself it’s nothing, it had to be connected with […] the organizing that was happening.” Similarly, Jascha Franklin-Hodge states that “you have to have the technology available, but you also have to have an organization that actually wants people to be organizing events, that wants people to be active in their neighborhood and not every organization has this ethos.” Matt Lira even argues that “Every person that does e-campaigning should do at least a couple months as a field organizer,” thus suggesting that the connection between online and offline organizing should be a centerpiece not only of campaigns’ strategies, but of Internet campaigners’ basic skills. As shown in Table 2, all interviewees but one mentioned the elective affinity between Web and grassroots campaigning. Furthermore, the Obama campaign is seen by most interviewees as providing a particularly favorable environment for online electioneering, as its strategy was centered on sustained investment in on-the-ground activities. There are again few differences
between Democrats (all of whom agreed) and Republicans (all of whom but four mentioned it) on this score. As suggested by Scott Goodstein:

In the end, campaigns come down to time, people, and money. [...] The Obama campaign was not about spending all the resources on mass communication to get the job done, we invested in the “people” part of the “time-people-money” equation more than we invested, or as much as we invested, in the “time” and “money” pieces.

It is important to recognize that the organizational and strategic decisions that Goodstein highlights derive from a significant change in the basic approach to campaigning, which Marshall Ganz describes as a shift from marketing to organizing:

There is a big difference between running a marketing campaign where you are trying to provide people with symbols and sources of information that will hopefully influence their behavior, and drawing people into relationships with one another and mutuality of commitment that in fact does shape behavior, and that’s what organizing is all about, so the move from marketing to organizing was something that [the Obama campaign] were very clear they wanted to do.

The strategic development that Ganz describes can be seen as a specification of the idea that campaigns have moved from a modern to a postmodern era (Norris, 2000), that is, from a managerial-marketing approach based on the repeated presentation of undifferentiated messages to the mass public through broadcast media, to a relationship-marketing orientation based on a deeper engagement of specific sectors of the public through narrowcast and potentially dialogic media (Bannon, 2005). While it has been claimed that the postmodern approach came of age in the 1990s in the United States, the Obama campaign might be seen as a particularly pure, or advanced,

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specimen of this ideal type due to the combination of now mature technologies and a deliberate organizational ethos.

An implication of these findings is that the incentives for campaigns to invest in new media might be significantly related to their strategic orientation towards building large-scale, labor-intensive operations, which have both an online and offline dimension and often occur at the intersection of the two: only campaigns that are based on these strategic premises might be able to harness the full potential of the Web. On the other hand, if Internet tools continue changing the economies of scale in direct-contact campaigning – as most of our interviewees believe they did in 2008 and will continue doing in the future – then field organization may become more relevant in U.S. campaigns as a result. This is also to be expected in light of the fact that voter mobilization seems to be paying higher electoral dividends than in the past (Endersby, Petrocik, & Shaw, 2006). However, once again Internet consultants and operatives do not see the Web as fundamentally transforming the dynamics of political organization and mobilization: twenty-four of our interviewees agreed on this point, as exemplified by these quotes:

I don’t think [the Internet] changes anything. Organizing is organizing. [...] Online organizing is just making it easier for campaigns to ask people to get involved and for people to learn about your campaign or your ideas. (Scott Goodstein)

The best online campaigns are the ones that recognize that they have a lot to learn from hundreds of years of campaigning. [...] I don’t think the Internet changes anything, I think it gives us different ways to do the same things and makes doing things easier. (Tracy Russo)

I think even more than the field side changing, the new media side changed a lot, because its mindset was not, “How do we get people engaged online?,” it always was, “How do we get people online to go out and work in the field program?” (Joy Cushman)
On this subject, however, while sixteen of our interviewees manifested full agreement, a sizeable minority of eight expressed qualified agreement: six consultants and two operatives emphasized that, while the Internet has not changed the way campaigns are run and voters contacted, they have made these processes more efficient and have lowered the barriers for citizens to become engaged in politics, as they are no longer bounded by most of the time and space constraints that used to hinder participation in the past.

In sum, the Internet’s impact on elections is considered to be contingent on the candidate’s personality and message, and in turn by their ability to generate movement-like enthusiasm among supporters; furthermore, the power of the new media is seen as dependent on the campaign’s strategic orientation to grassroots organizing. That the Internet is not considered as a stand-alone force, but as part of a multi-faceted process where campaign strategy and organization play a significant role, brings us to the organizational issues raised by new media electioneering and how they were addressed in the campaign.

Top-down and/or Bottom-up? Hybrid Campaign Organizations and Shifting Power Relationships

The 2008 Presidential race offered examples of radically different models of campaign organizations, which had significant implications for the adoption and effectiveness of Internet tools. Twenty-three interviewees, equally balanced between Republicans (11) and Democrats (11) together with one Independent, identified significant organizational differences between the Obama and the McCain campaign. The latter was often judged to be more institutional and less open to external input, to the extent that, for instance, supporters who organized events through McCain’s
Web site needed approval from the campaign before their event was published. By contrast, 26 consultants and operatives observed that the 2008 campaign marked the development of a hybrid organizational model that integrated the hierarchical and participatory aspects which had until recently been treated as mutually exclusive in electoral organizations, and that the Obama campaign best embodied such hybrid model. Michael Turk, who directed George W. Bush’s 2004 e-campaign, claims that the Bush and Dean Presidential campaigns can be seen as ideal types of organizational polar opposites: while the former was based on strict control of volunteer activity through detailed instructions and metrics-based accountability, the latter was, at least in the online realm, an almost entirely bottom-up endeavor, premised on the idea that electing Dean was a side effect of his supporters’ engaging with one another. While the Bush campaign was strictly centralized, the Dean campaign was not decentralized, but, rather, acentric in its relationship with supporters, which, as we noted earlier, resulted in conflicts when the spontaneous efforts of its volunteers collided with the campaign’s top-down message dissemination. Turk argues that “Obama learned very well the lessons of both those campaigns. […] They had the human connection, they had the sort of Howard Dean model, but they also applied to the Howard Dean model the Bush idea that […] you need to make sure that those people are making their numbers.” Obama’s hybrid organizational model synthesized those two opposites because it acknowledged the relevance of both structure and spontaneity and moved fairly seamlessly and eclectically between these two models, as Ganz and Bird explain:

2 Only Ben Olson explicitly claimed that the McCain campaign “definitely encouraged grassroots activity and bottom-up activity that is the cornerstone of any successful campaign” and did not acknowledge differences with the Obama campaign on this score. By contrast, most Republican interviewees admitted that McCain’s organization was less open and more controlled than Obama’s, although, understandably, their assessments tended to be more nuanced than those by Democratic sources.
It is not either/or, whether you look at it as being top-down or bottom-up or whether you look at it as being part and whole. […] It must be very clear from the get-go that structure enables cooperation and creativity, it’s not a constraint on it, it rather creates a space for it to be meaningful and parts need to be parts of a whole in order to be able to transcend the limitations of localism. (Ganz)

I think what we were able to do is combine the sort of empowerment model in terms of the way we related to people, but also putting them into a structure that made sense so that people knew what their goals were, they knew what they were responsible for and they were being held accountable, but yet they had the ability to really take ownership. (Bird)

In a more iconic way, Goodstein argues that “a lot has been written about online organizing and the grassroots ‘revolution.’ Well, the grassroots revolution still needs to be organized.” Thus, the Obama campaign did not see control and participation as conflicting goals and turned what used to be considered a trade-off into a multiplier mechanism by which online supporters’ entrepreneurial activities were integrated with an institutional structure that maintained some directional power on them. The interplay of new political technologies and hybrid organizational developments has thus replaced the dilemma between centralization and decentralization with mechanisms that breed distributed structures that are both scalable and controllable and merge practices drawn from paradigms that were previously believed to be mutually exclusive.

The question then arises how the combination of these two models was achieved. Most of the evidence points to the importance of data-assisted guidance, which was mentioned by 24 of our interviewees. One of the main tenets of the Obama campaign, as we have already seen, was the imperative to integrate the supporters’ spontaneous online activities with the campaign’s strategic
goals and on-the-ground operations. Thus, Obama’s staff constantly relied on the Internet to provide clear requests to volunteers in order to effectively channel their behavior, as Hughes explains:

The overall philosophy was truly a hybrid approach: we wanted people to self-organize, we thought that self-organizing was really the cornerstone of the campaign, so anybody could create any event, anytime, anywhere, and that was certainly the basic tenet of what we believed in. But, at the same time, we really believed in structuring what the community was doing, suggesting as many things as we could that would be directly helpful to the campaign, while also providing support to the activists who were really feeding into the larger campaign goals.

In practical terms, although Obama’s Web site allowed visitors to freely engage in various efforts and to organize some at their discretion, it also explicitly requested that particular activities and events be carried out by a precise set of volunteers, on a certain day, in a specific area, and with defined goals; it provided selective incentives, such as help and recognition from campaign leadership and staff, to those volunteers that most closely followed the instructions; it encouraged supporters to increase their level of engagement by asking them to raise their level of involvement, for instance, from attending a house party to hosting one; finally, it provided training both offline, in dedicated organizing camps, and online, through Web videos and detailed “how-to” information pages. As Bird explains, “a lot of campaigns become top-down because they are afraid that their volunteers will do stuff that they don’t want to do. That happens when you’re not given clear goals and then people go on and do whatever they want to do and there is no structure.” In providing volunteers with explicit and detailed directions, the use of individual data to target messages and tasks was paramount, as Rospars explains:
Through the use of data you can better direct the work of people who are doing stuff from the bottom-up. So, what’s the use of having a bunch of people doing bottom-up canvassing and phone-baking if the data is not fed back into the system to measure effectiveness and target different universes of voters in the same way that they would if they came into the office? […] If somebody who is a veteran logs onto [Obama’s online volunteering tool] to make phone calls and the system serves him up voters who are veterans, that’s an important use of data that helps grow a more bottom-up community of veterans that are helping the campaign.

Obama’s hybrid organizational model thus rested on the equilibrium between supporters’ movement-like entrepreneurial activism and the campaign’s ability to institutionally monitor and direct it. Because it actively managed the flow of volunteer information rather than passively observing it, the campaign could make relatively safe assumptions as to the progress and outcome of its supporters’ efforts. From Howard’s (2006) viewpoint, this approach can be seen as a further extension of the realm of managed citizenship, as it increases the power of campaign managers while at the same time encouraging carefully controlled citizen participation. On the other hand, database technologies also create opportunities for deeper volunteer engagement and more trustful relationships between campaigns and supporters. Both the Obama and, to a lesser degree, the McCain campaign not only shared their voter-contact data with their online supporters, but they also allowed them to edit such information, thus marking a significant departure from a recent past in which political organizations jealously concealed these data from outsiders. From the campaigns’ perspective, the ability to guide and monitor volunteers’ activities through Internet-shared data alleviates the preoccupation that control is lost when supporters deliver messages, thus encouraging political organizations to become more open to outside participation and to adopt more flexible and grassroots-oriented power arrangements.
Indeed, most (23 out of 31) of our interviewees emphasized that, in this hybrid environment, supporters tend to be more docile and reliable than is commonly assumed by both scholars and political operatives. Remarkably, the majority of both Democratic and Republican sources agreed on this score (11 and 12, respectively, out of 15), notwithstanding the fact that the latter have been described by many of our informants, from both parties, as not trusting volunteers enough to cede them some control over the campaign message and thus preferring hierarchical and centralized organizations. As Kevin Thurman highlighted, supporters can be considered reliable to the extent that they receive clear directions and are motivated by a specific goal such as electing a candidate:

I think it’s a big mistake to think that a lot of the organizing that is done online is not as top-down as the campaigns in the past. […] The Internet has allowed creating organizations that have very specific goals, such as electing a candidate or fighting a proposition, and so in the end, as much as they may be bottom-up, because they are directed towards trying to achieve a specific goal, they are more likely to follow a top-down direction than the old political institutions that had their own interests and goals.

This notion recalls Bimber’s (2003) concept of event-based political membership and highlights one of its seldom mentioned potential consequences: as citizens self-select specific, time-bound, and goal-oriented causes in an environment that offers multiple low-barrier engagement opportunities, savvy organizations might be able to wield more power over their members than was the case with permanent-membership bureaucratic structures. While the consultants and operatives interviewed for this study emphasize that the Obama campaign strongly relied on individual empowerment and grassroots activity, summarized in its “Respect – Empower – Include” mantra, they also note that these efforts required a robust structure and a conspicuous organizational effort, which involved direction and guidance as well as dialogue and openness. Thus, there seems to be more of a dialectic relationship between centrifugal and centripetal dynamics, rather than a sheer move...
towards decentralization. The extent to which top-down and bottom-up dynamics complemented each other is apparent in Russo’s comments:

There has been a lot of chatter about the model that the Obama campaign employed which was, on the surface, very bottom-up, very grassroots-driven, but when you really look critically at it, even though they were putting a lot of responsibility in the hands of their supporters, they were ultimately directing those tasks and they were driving that process so that supporters were channeling their energies towards something that would yield the goals that the Obama campaign was looking for. […] It’s kind of shepherding individuals through the process.

Thus, what on the surface appears as spontaneous self-organization powered by new media is better understood as a relationship where the campaign has not renounced the idea of exercising influence altogether, but is finding new ways to achieve such purpose though a blend of institutional and entrepreneurial modes of engagement in collective action. A similar notion can be found in Lira’s argument that, as a result of changes in communication and organization dynamics, campaigns should substitute guidance for control in their message operations: “when you are guiding something you are not controlling it, you have people who are following you willingly to that message.” Thus, our analysis of the Obama campaign indicates that the intersection between political dynamics and Internet technologies is breeding hybrid organizational structures that blend top-down and bottom-up ideal types, promote the coupling of horizontal and vertical relationships, and in the process enable campaigns to develop message-distribution apparatuses that offer the advantages of both mass scale and personal contact, while careful guidance enhanced by database techniques helps minimize the costs of diminished message control. These arrangements can be seen as steps towards diminishing the transaction costs caused by information oversupply that Nielsen (2009) identifies as sources of various communication and organization dysfunctions.
However, the balance between empowering supporters and maintaining control over the strategy and key tactics was not achieved once and for all by the Obama campaign. One episode during the presidential race showed that tensions can arise when the top-down and bottom-up paradigms are integrated. In late June 2008, a group was formed on Obama’s online volunteer-networking platform to protest against the Senator’s decision to vote in favor of expanding the Foreign Intelligence Surveillance Act (FISA), which deals with physical and electronic surveillance to prevent terrorism. The group quickly grew to about 24,000 members and became the largest on Obama’s platform. That a tool designed by a campaign should be used to voice criticism against the candidate was a natural consequence of Obama’s emphasis on citizen empowerment and grassroots campaigning so that, as claimed by Rospars, supporters of the Democratic nominee considered his online platform “a public utility that they could use to express their support.” That they employed it to express dissent rather than support was, however, a potentially disruptive corollary of Obama’s hybrid organizational model. The campaign chose to respond by openly acknowledging the legitimacy of the group’s presence on Obama’s volunteer network, and the candidate addressed the online dissenters in a message in which, while not changing his stance on FISA, he openly welcomed his supporters’ efforts to influence his decision and the development of the law. While this unusual choice by the Obama campaign partially muted the controversy, campaigns that promote a certain degree of bottom-up empowerment are poised to encounter similar challenges and have to devise responses that, while reaffirming the candidate’s position and relative autonomy from pressures from below, do not overly contradict the movement-like organizational principles on which supporters trust the campaign to be rooted.

Obama’s hybrid model, which, as we saw earlier, came into being as a result of the interplay of various contextual, strategic, and organizational conditions, is regarded by our interviewees as the most effective and innovative in the 2008 campaign. However, it was not the only organizational model that could be observed in the Presidential contest. On the one hand, as was previously mentioned, McCain’s campaign employed a more traditional, less flexible command-
and-control structure that emphasized relatively unidirectional uses of the new media, aimed at
distributing carefully controlled messages to targeted audiences and at influencing mass media
coverage of the candidate. In this respect, McCain’s Internet strategy derived from, and was
consistent with, broader decisions about the overall campaign strategy and organizational structure.
However, these choices are seen by most of our interviewees as having impeded, more than any
possible lack of technical expertise and resources, McCain’s ability to harness the new media to
build a network of supporters, mobilize his voters, and raise funds.

While the McCain campaign was quite centralized, controlled, and institutional – both
offline and online –, the election featured at least one other campaign that is relevant for this
discussion—the Ron Paul primary campaign. Paul’s organization employed Internet tools to give its
supporters complete freedom to campaign on behalf of its candidate, with so little input from the
staff that Justine Lam calls even the Dean campaign a top-down operation compared to Paul’s
bottom-up model, which she so describes:

We had a very decentralized approach, we did not take the top-down route […] there were
some things that we asked [supporters] to do, like spread the word and make a donation, and
find a MeetUp group in your area, but other than that we did not give them too much
direction from the campaign […] People would call us and would have a lot of ideas about
things we could do, and we would tell them, “Yeah, that’s great, we can’t actually tell you
what to do because of the federal election campaign regulation, but you should feel free to
use your creativity and money and time and energy and everything you know to spread the
word,” and they took that message and did that exact thing, and they knew they should not
rely on us for everything and be more independent, more free I guess to experiment. I think
that’s the beauty of it and that’s what allowed us to harness the energy to do things online
and offline.
Paul’s campaign choice to not control its online volunteers by any means, apart from rare conference calls, helped him attract a significant following online, mostly composed of libertarians who were ideologically inclined towards these decentralized and autonomous forms of political engagement. This bottom-up model benefitted Paul’s campaign in that its supporters spontaneously organized large fundraising drives that collected about 35 million dollars in the presidential cycle, including two one-day drives that raised 4.2 and 6 million dollars respectively. However, even Lam acknowledges that such a fully entrepreneurial organizational model had its downsides: “You lose the ability to run a top-down organization, which I think is still crucial for a campaign because you need to tell people what to do, especially towards the end, in the last few months, you need to have people organized and you need to let them know what they should do.”

We can conclude from this juxtaposition that the adoption and the effectiveness of a hybrid model such as that developed by the Obama campaign is contingent on various other strategic and organizational choices, which can lead to various positions in the top-down/bottom-up continuum. Other models, such as McCain’s relatively institutional structuring and Paul’s purely entrepreneurial approach, were also enacted, but their results, and their impact on the effectiveness of Internet tools, were no match for those enjoyed by the Democratic nominee.

Discussion

Before assessing the implications of our findings, we must acknowledge the main limitations of this study, which are related to its object as well as its methodology, that is, to its being a qualitative case study of a single country in an exceptional election.

In terms of the content and focus of this research, the 2008 U.S. presidential race is clearly a deviant case by comparison with other elections both diachronically and synchronically. As we wrote in the first paragraph, the campaign was unique and unprecedented in many ways, and thus our findings are not easily generalized to other elections or political systems. However, in a fast-
evolving domain such as Internet politics, every significant innovation at first bears the semblance of an exception, only to become the rule shortly after. One should be reminded that “before Dean and the ‘Deaniacs,’ Internet campaigning was widely regarded as dead and buried” (Chadwick, 2006, p. 144). While many analysts did not change that assessment even after 2004, the innovations introduced by the Dean campaign were replicated, adapted, and perfected by most candidates in 2008. As online electioneering is a fluid environment, where change and learning constantly occur through emulation and trial-and-error, research must be able to comprehend the discontinuities introduced by path-breaking political actors and exceptional events in order to then develop broader generalizations.

With respect to methodology, any qualitative approach such as the one employed in this study bears well-known shortcomings, most notably the lack of hypothesis-testing capability and limited external validity. These downsides, however, are compensated by the ability of qualitative techniques to provide a richer, thicker description of the phenomena that are studied. Specifically, qualitative interviews allowed us to reconstruct the operating philosophies of elite political actors that are particularly well placed to steer the course of Internet campaigning. Thus, while any generalization across either time or space from this case study would be unwarranted, the insights that we could draw from intensely engaging with the meso level of e-campaigning could not have been achieved through statistical methods.

One final cautionary note is that interviewing campaign professionals and operatives might introduce biases that could affect the validity of our data. The most obvious one is that our sources, particularly consultants, might not be willing to reveal their “trade secrets,” especially when they think that they are valuable to their clients and unknown to their competitors. In conducting the interviews, we strived to avoid such bias by openly emphasizing the research nature of our endeavor, by asking professionals to focus less on the techniques they employed and more on their contextual limitations and organizational consequences, and by refraining from probing consultants about the specifics of how online tools were built and perfected, especially in regard to fundraising,
which is arguably the topic most likely to elicit elusive responses. A related potential source of bias lies in the possibility that consultants and operatives intentionally understate the power of e-campaigning tools in order to boost their legitimacy by implying that their candidate’s success or failure was somehow inescapable. While this might partially contradict the expectation that consultants tend to “oversell their goods” due to their vested interest in advancing the tools they produce, we cannot rule out the possibility that, because political collective action is enhanced by the ability to create movement-like dynamics, those who believe they possess the recipe for eliciting them might publicly disguise it underneath the pretense of seemingly unstoppable tides that would have occurred with or without the new media.

Ambiguity is, however, an inherent difficulty in assessing the dynamics of hybrid organizations which leave their footprints in different realms of collective action. The more complex organizations become, the more room there is within them for differences between elites’ and participants’ views and the greater the leaders’ leeway to strategically present specific facets of their organizations to different audiences (Flanagin, Stohl, & Bimber, 2006, p. 44). As Nielsen (2009) has shown, users might develop views and habits that are remarkably different from those described by the producers of online campaigning tools.

While the sheer possibility of these biases warrants caution and demands further scrutiny of our findings through different methodologies, three considerations encourage us to trust the internal validity of our results. First, rather than being taken at face value, all the statements reported in this study were carefully scrutinized through comparison with other interviewees’ viewpoints, theory, and empirical evidence from previous studies. Secondly, as readers can appreciate by comparing the statements reported in Table 2 and the interview questionnaires reported in Appendix A, our findings stemmed from the answers provided by the consultants and operatives that we conversed with, rather than being in any way built in, or embedded, in the questions that we asked to elicit their reflections. For instance, on the subject of organizational models, we prompted our sources to reflect about the apparent trade-off between control and empowerment, but nothing in our questions
suggested that this conundrum could be solved through a hybrid arrangement that could reconcile these two opposites: this idea came entirely from our informants, although it confirmed our expectations and various insights from the literature. Thirdly, most interviewees, both consultants and operatives, Republican and Democratic, winning and losing, involved in the primary and in the general election, working in new media units and in other campaign departments, provided remarkably similar accounts of the phenomena we investigated. None of the statements reported in Table 2 was agreed on by less than 23 out of 31 interviewees, and the average number of informants who supported a statement was almost 26; even when agreement on a certain issue was less than unanimous, it was mostly because some of our sources had not assessed it during our conversation, rather than because they disagreed with it.

Our findings have significant implications for election campaigns, political organizations, and citizen participation, which we now briefly discuss. First, this study has shown that there is widespread agreement across party lines in U.S. politics about the main dynamics that shape Internet campaigning. The growth of an autonomous class of consultants and operatives specialized in new media strategy and tactics can be expected to lead to increasingly standardized e-campaigning methods and approaches, but at the same time the incessant technological innovations and changes in the expectations and behaviors of the public will continue to benefit those

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3 As was previously highlighted, on two issues related to the magnitude of the effects of the Internet on political dynamics and campaign organization, while most consultants expressed opinions similar to those voiced by operatives, they were slightly more likely to qualify their statements by emphasizing areas in which online tools have significant effects and transformational power. This finding is not surprising in light of the fact that consultants have a vested interested in promoting the products and strategic advice they sell, while operatives tend to be more detached from their field of expertise. However, these differences amount to undertones rather than clear-cut contrasts, as the numbers in Table 2 demonstrate.
innovators who achieve a competitive advantage in this arena through a combination of careful observation of previous experiences, big-picture strategizing, and incremental experimentations. As all these aspects are constantly evolving, no study at this point can say a definitive word on the developments of Internet politics, and thus future research will need to constantly reassess these issues based on the innovations introduced in each campaign cycle.

The second aspect that emerges from this study, however, is that success in online campaigning is by no means simply a matter of adopting the newest (or costliest) tools available, or of uncritically reproducing and repackaging platforms that were helpful to other candidates. The effectiveness of Internet applications depends on contextual factors, such as the personality and message of the candidate and the ability to elicit a strong grassroots response from a large enough portion of the electorate. When these forces are already in place, the new media can efficiently channel such energies toward electoral and political goals; by contrast, when these preconditions are absent, the impact of online tools can be expected to be marginal. One implication of these findings is that a one-size-fits-all approach to e-campaigning by political actors is generally unwarranted. Although in 2008 most candidates adopted a similar set of online tools, the outcomes of their efforts depended on contextual and organizational factors. While Obama’s success can be expected to encourage imitation in the United States and elsewhere, the impact of these efforts will depend on at least three sets of preconditions: firstly, the candidate’s leadership and inspirational skills; secondly, the resonance of the campaign message with a sufficiently large and active portion of the electorate; thirdly, the campaign’s strategic prioritization of on-the-ground, grassroots campaign activities. As these findings illuminate intra-institutional dynamics, they can be integrated with the work of scholars who are investigating how different institutional arrangements affect online campaigning (Anstead & Chadwick, 2008).

Furthermore, our conclusions imply that there might be unequal micro-level incentives for different candidates and campaigns – and, possibly, parties – to develop and prioritize online communication. For politicians who cannot inspire a large movement-like following among
supporters, or who do not find it cost-effective to significantly rely on personal voter contact and build the on-the-ground organization that it requires, it would be irrational to heavily rely on Internet electioneering. What remains to be seen is whether the competitive advantages that can be reaped from effective new media campaigning will turn out to be large enough to spur a process of natural selection by which candidates and campaigns that do not fulfill the conditions highlighted in this study will progressively be winnowed out of the competitive field. These are intriguing questions on which we encourage future research.

A third finding of this study is that, as the Internet opens up new avenues for citizen engagement and empowerment, political organizations develop innovative hybrid arrangements to respond to the challenges that arise as a result of the changing relationship between leaders and followers. In the 2004 presidential race, Dean developed the prototype of an apparently directionless bottom-up campaign that relied solely, or nearly so, on Internet-enhanced volunteer participation; by contrast, the Bush campaign provided the model for a top-down, metric-driven, command-and-control operation. In 2008, the Obama organization devised approaches, tools, and practices that combined elements of both models, relinquishing control while maintaining guidance, encouraging self-direction while exercising power, enabling creativity while assuring purpose and accountability. Whether such a hybrid structure can be replicated and perfected is, again, a question for future research, but our findings clearly confirm the point made by other scholars that ‘although organizations are adopting more entrepreneurial modes of interacting […] they are not necessarily giving up institutional modes’ (Flanagin, Sthol, & Bimber, 2006, p. 49). In the past, online politics has often been caricatured as the realm of spontaneity, self-affirmation, and uncompromising individual freedom, while the evidence presented here reminds us that a campaign is an interdependent “socio-technical network” (Foot & Schneider, 2006, p. 18) that arises with a specific purpose, the pursuit of which requires strategy, structure, organization, and compliance. While the development of e-campaigning offers increasing opportunities for citizens to participate in the political process on their own terms and at their discretion, it also provides campaigners with tools
that enable efficient data-assisted guidance of purposeful supporters. Although the formal bureaucratic hierarchies and command-and-control procedures of yesteryear might not be fully reproducible in online political organizations, they can be replaced by softer and subtler mechanisms rather than simply giving way to spontaneity and self-assertion. Campaigns and politics still require balancing individual and collective prerogatives, which the Internet offers new avenues to reconcile.

Our findings regarding the consensus among consultants and operatives about the effectiveness of Obama’s hybrid organizational model lead us to hypothesize that future campaigns will likely try to adopt similar models. However, our study also pointed out that the feasibility and success of the hybrid arrangements we described are contingent on the contextual factors identified above and breed challenges as well as opportunities for campaigns, as the FISA incident showed. As online electioneering professionals and operatives recognize the constraints and the risks as well as the advantages of the hybrid model developed by the Obama campaign, the degree to which they will imitate it will depend on whether or not they anticipate that its benefits outweigh its costs. It is by no means certain that campaigns in the future will strike a balance between control and participation similar to Obama’s, but it can be expected that acknowledgment of the opportunities arising from data-assisted guidance will reduce the perceived costs of relinquishing a modicum of control. As both Flanagin, Sthol, and Bimber. (2006) and Chadwick (2007) point out, the extension and integration of different participatory repertoires and organizational arrangements does not produce one dominant paradigm, but a plurality of solutions that can be creatively harnessed and integrated by different political actors, or by the same political organization carrying out different tasks and interacting with different sectors of the public.

One final lesson to be learned from this study is that the decisive factor in the trajectory of contemporary campaigns is not their sheer investment in new media tools, as online political technology is becoming commonplace to the point of being considered a “commodity” among campaign consultants and operatives. Thus, research needs to better comprehend the interplay
between political, strategic, organizational, and communication variables, and the extent to which innovations in online campaigning enable elites and citizens to advance their causes and achieve their goals. That the literature on Internet politics is moving from assessing the contents of candidates’ and parties’ online operations to evaluating their wider organizational implications is thus a welcome development, to which this study has sought to contribute.
References


Appendix A

Questionnaire Design and Wording

The questionnaire consisted of three tiers of questions. The first tier included ten questions, which were asked to all interviewees regardless of their role in the campaign. Question order and wording varied due to the interviewee’s specific skills, as well as the context and the development of the conversation, but content did not. Here are the questions as prepared for delivery:

1. Please describe your role in the campaign and the activities you oversaw.

2. What is the relationship between online campaigning and external political realities? Can the Internet drive political processes or is it mostly a channel for existing realities?

3. How do campaigns motivate their online supporters? What factors are crucial in encouraging people to engage online and offline? What difference do Internet tools make?

4. What role do factors such as party, candidate, and message play in motivating individuals for online and offline participation? How did these aspects play out in the 2008 election?

5. Internet tools have been said to allow people to ‘organize without organization’. How do campaigns deal with the trade-off between structure and organization, on the one hand, and grassroots, bottom-up ownership of the campaign, on the other?

6. Online campaigning has been said to change the economies of scale in fundraising, canvassing, phone banking. Recently, campaigns have rediscovered the importance of the ground game to win elections. What role do you think the Internet has played in this process?

7. Conventional wisdom claims that, because online users self-select the contents they are exposed to, little or no persuasion can occur over the new media. Did your campaign accept this as a reality? How did it try to circumvent it?
8. According to various metrics, there was a significant gap in online success between the Obama and McCain campaigns and between Democratic and Republican candidates during the primaries. Do you agree? How do you explain these differences?

9. Do you think Republicans and Democrats face similar hurdles when trying to engage their supporters online?

10. Compared to 2004, did 2008 constitute a paradigm shift in online politics or just a deeper, more thorough replication of the paradigm of online engagement inaugurated in 2004?

The second tier included five questions that were tailored to the specific expertise and role of our sources in the 2008 campaign. For example, Marshall Ganz was asked about the organizational values and practices that he advised the Obama campaign to adopt, Justin Germany received questions about online video production and distribution, Christian Ferry was quizzed about the strategic role of the Internet in the McCain campaign, and Sam Graham-Felsen was asked about the process of content production in Obama’s blogs. Those interviewees who did not perform a specialized role in the campaign, such as Internet directors, online communications directors, and so on, received at least some of the following general questions:

1. The Internet can be seen as a tool to distribute information or as an environment to enhance participation and organize people. How did these two dimensions play out in the campaign? Are there any tradeoffs between these two goals?

2. How did the campaign conceive of the online audience and how did it segment it?

3. The 2008 campaign saw an increasing role for social-networking sites such as Facebook and external websites such as YouTube and Eventful. What was the relationship between the campaign website and these external sites?

4. To what extent is the Internet now integrated with other campaign departments? Are there differences in the relationships with them? What is still to be done?
5. With the increasing role and effectiveness of Internet tools, one issue that becomes more important is how to keep the infrastructure built during a campaign working and growing between campaigns. How has that affected your work this time around and do you see signs that what was accomplished in 2008 will be preserved for the next election cycles?

Finally, the third tier included five items reserved for follow-up enquiries and questions that addressed issues that were not featured in the prepared questionnaire but had been raised during the conversation. This part of the interview was specifically designed to cast further light on topics that the interviewee had raised only in passing, or on which he/she had shown signs of having an interesting viewpoint or a unique perspective.

It is important to note that this article has analyzed only a portion of the data collected during the interviews. Thus, not all the answers to the questions detailed in this Appendix have been discussed in the article, but will be the basis for further studies in the future.
Author Note

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University of Bologna

Cristian Vaccari (Ph.D., Università IULM, Milan, 2006) is Assistant Professor in Political Communication at the Department of Political Science of the University of Bologna. He studies political communication in comparative perspective, with a particular focus on the new media. He has authored and coauthored three books in Italian and his scholarship has been published on Political Communication, New Media & Society, European Journal of Communication, and French Politics, as well as in various international edited volumes. He has been a visiting scholar at Columbia University, Massachusetts Institute of Technology, and American University.

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### Table 1

#### List of Interviewees

<table>
<thead>
<tr>
<th>Name</th>
<th>Party Affiliation and Professional Status</th>
<th>Role in 2008 Campaign</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ralph Benko</td>
<td>Republican consultant</td>
<td>Commentator</td>
</tr>
<tr>
<td>Jeremy Bird</td>
<td>Democratic operative</td>
<td>Barack Obama Ohio general election director</td>
</tr>
<tr>
<td>Joy Cushman</td>
<td>Democratic operative</td>
<td>Obama Georgia and Florida deputy field director</td>
</tr>
<tr>
<td>Soren Dayton</td>
<td>Republican operative</td>
<td>Member of John McCain’s political team</td>
</tr>
<tr>
<td>Christian Ferry</td>
<td>Republican operative</td>
<td>McCain deputy campaign manager, formerly e-campaign director</td>
</tr>
<tr>
<td>Jascha Franklin-Hodge</td>
<td>Democratic consultant</td>
<td>Chief technology officer at Blue State Digital, the company that developed Obama’s Internet services</td>
</tr>
<tr>
<td>Judith Freeman</td>
<td>Democratic consultant</td>
<td>Obama online organization advisor</td>
</tr>
<tr>
<td>Eric Frenchman</td>
<td>Republican consultant</td>
<td>Chief Internet strategist at Connell Donatelli, the company that developed McCain’s Internet services</td>
</tr>
<tr>
<td>Marshall Ganz</td>
<td>Democratic consultant</td>
<td>Obama advisor on organization and lecturer at the Harvard University Kennedy School of Government</td>
</tr>
<tr>
<td>Thomas Gensemer</td>
<td>Democratic consultant</td>
<td>Managing partner at Blue State Digital</td>
</tr>
<tr>
<td>Justin Germany</td>
<td>Republican consultant</td>
<td>McCain director of online media and employee of Campaign Solutions, part of Connell Donatelli</td>
</tr>
<tr>
<td>Scott Goodstein</td>
<td>Democratic consultant</td>
<td>Obama external online director and founder of consulting company Catalyst Campaigns</td>
</tr>
<tr>
<td>Sam Graham-Felsen</td>
<td>Democratic operative</td>
<td>Obama director of blogging and blog outreach</td>
</tr>
<tr>
<td>Katie Harbath</td>
<td>Republican consultant</td>
<td>Rudolph Giuliani deputy e-campaign director</td>
</tr>
<tr>
<td>Chris Hughes</td>
<td>Democratic consultant</td>
<td>Obama director of online organizing and co-founder of Facebook</td>
</tr>
<tr>
<td>David Kralick</td>
<td>Republican operative</td>
<td>Internet director of American Solutions, a 527 group founded by Newt Gingrich</td>
</tr>
<tr>
<td>Cyrus Krohn</td>
<td>Republican operative</td>
<td>Republican National Committee e-campaign director</td>
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<tr>
<td>Justine Lam</td>
<td>Republican consultant</td>
<td>Ron Paul e-campaign director</td>
</tr>
<tr>
<td>Matt Lira</td>
<td>Republican operative</td>
<td>McCain Webmaster</td>
</tr>
<tr>
<td>Brad Marston</td>
<td>Republican consultant</td>
<td>Founder of <a href="http://www.letsgetthisright.com">www.letsgetthisright.com</a>, a Web site supportive of McCain</td>
</tr>
<tr>
<td>Phil Noble</td>
<td>Independent consultant</td>
<td>Commentator</td>
</tr>
<tr>
<td>Ben Olson</td>
<td>Republican consultant</td>
<td>McCain deputy e-campaign director</td>
</tr>
<tr>
<td>Joe Rospars</td>
<td>Democratic consultant</td>
<td>Founding partner of Blue State Digital and Obama new media director</td>
</tr>
<tr>
<td>Patrick Ruffini</td>
<td>Republican consultant</td>
<td>Giuliani Internet advisor</td>
</tr>
<tr>
<td>Tracy Russo</td>
<td>Democratic consultant</td>
<td>Obama advisor and John Edwards deputy online communications director</td>
</tr>
<tr>
<td>Tim Tagaris</td>
<td>Democratic operative</td>
<td>Chris Dodd Internet director</td>
</tr>
<tr>
<td>Kevin Thurman</td>
<td>Democratic consultant</td>
<td>Hillary Clinton deputy Internet director</td>
</tr>
<tr>
<td>Michael Turk</td>
<td>Republican consultant</td>
<td>Fred Thompson e-campaign advisor and George W. Bush 2004 e-campaign director</td>
</tr>
<tr>
<td>Robert Willington</td>
<td>Republican operative</td>
<td>Executive director of the Massachusetts Republican party</td>
</tr>
<tr>
<td>Brian Young</td>
<td>Democratic operative</td>
<td>John Kerry Internet director</td>
</tr>
<tr>
<td>Anonymous source</td>
<td>Democratic operative</td>
<td>Member of the Obama Internet team that requested anonymity</td>
</tr>
</tbody>
</table>
Table 2

*Degree of Agreement on Various Statements among Interviewees*

<table>
<thead>
<tr>
<th>Statement</th>
<th>Agree</th>
<th>Agree with qualifications</th>
<th>Disagree</th>
<th>Not assessed</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Internet mostly channels support and resources towards a candidate that already exist rather than driving political processes</td>
<td>25</td>
<td>3</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>The characteristics of the candidate and the campaign message are key to generating enthusiasm among supporters and thus to develop a large following online</td>
<td>28</td>
<td></td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Campaigns that rely heavily on grassroots supporters and on-the-ground electioneering are poised to benefit the most from online tools</td>
<td>30</td>
<td></td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>The Obama campaign provided an ideal seedbed for online electioneering, as its strategy was centered on sustained investment in grassroots activities</td>
<td>27</td>
<td></td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>The Web is not fundamentally transforming the dynamics of political organization and mobilization</td>
<td>16</td>
<td>8</td>
<td>7</td>
<td></td>
</tr>
<tr>
<td>There were significant organizational differences between the Obama and the McCain campaign, the latter being more hierarchical and controlled</td>
<td>20</td>
<td>3</td>
<td>1</td>
<td>7</td>
</tr>
<tr>
<td>Especially the Obama campaign employed the Internet to develop a hybrid organizational approach that reconciled control and participation</td>
<td>26</td>
<td></td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Hybrid organizational arrangements are facilitated by the skillful use of individual data</td>
<td>24</td>
<td></td>
<td>7</td>
<td></td>
</tr>
<tr>
<td>If volunteers receive directions and are motivated by a specific goal such as electing a candidate, they tend to be quite reliable</td>
<td>23</td>
<td></td>
<td>8</td>
<td></td>
</tr>
</tbody>
</table>

Note: based on author's evaluation of interviewees' statements.