The Digital Election

The Campaign to Re-elect Barack Obama

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Executive Summary

The US Presidential election in 2012 was the continuation of an evolution in political campaign in engagement that began with Howard Dean's 2004 Primary campaign, and has continued in every Presidential and Congressional election since, as well as in other elections around the world. The 2008 Presidential election was widely regarded as the most effective digital campaign, until this most recent election.

The digital communications space changes at a tremendous pace. Strategies and tactics that may have seemed revolutionary in 2008 were regarded as standard practice or even obsolete in the 2012 campaign.

The purpose of this trip was to investigate these changes in strategy and tactics, to witness first-hand how the big political campaigns were using digital technologies to communicate with, connect to and coordinate their voters and supporters.

The aim was to focus on the use of mobile and social media technologies by the campaign teams.

I met with campaigners from non-government organisations as well as Democratic campaign vendors and developers in order to learn how contemporary technologies were incorporated into the campaigns, and to gain insight into what may be coming next.

The consistent theme throughout these discussions was that the tools, techniques and platforms allow campaigns to analyse their success and refine their engagement very precisely. The technical challenges presented by this volume of data were huge, as were the strategic challenges in interpreting the information to reach a point where an action could be taken.

The 2012 Organising for America (OfA) campaign to re-elect President Obama planned for and resourced a huge digital team in-house. Prior campaigns had relied far more heavily on contractors and outside vendors, an approach the Republican Presidential campaign largely persisted with.

The campaign proved to be evolutionary rather than revolutionary for the most part. Many campaign elements were simply scaled up, well-executed applications of existing best practice.

That said, the successful OfA digital campaign had four standout improvements over previous Presidential and other political campaigns:

- Digital infrastructure was prioritised from the outset. Mission critical systems were purpose built, but only on trusted platforms that had been used effectively at scale;
- All of the information the campaign generated was entered into one central database that became the key instrument to guide further decision making and innovation throughout the campaign;
- Mobile technologies were used both to contact potential voters and supporters that may have otherwise been unreachable, and activate supporters to take a useful campaign action wherever they were; and
- Facebook was used to allow supporters to campaign by proxy – to communicate with their own friends and family about the campaign with an authority that the campaign itself did not have.

Itinerary

Beginning in California, I met with platform vendors and system developers in Los Angeles and San Francisco. I then travelled to New York to meet with several digital campaigners and more vendors – several meetings were disrupted or cancelled due to Hurricane Sandy – before joining some Democrat field campaigners travelling to Pennsylvania for the final days of the Presidential campaign. I subsequently travelled to Washington D.C. to meet with some campaign strategists and platform vendors before returning to New York for further meetings with developers and digital campaigners.

Matthew Welty

Matthew is a consultant, having worked as the Director of Engineering for social network, Path, and Operations Manager/Engineer for Facebook before that.

My discussion with Matthew focussed on where he saw mobile and platform development heading, and how he saw the existing platforms evolving.

Joe Conte - NationBuilder

NationBuilder, marketed as an affordable community organising system, became available in 2011. Built incorporating the lessons of election campaigns across the world, notably the 2008 Obama campaign, it was used very successfully by the Scottish Nation Party in 2011.

Joe Conte is a Senior Business Organiser at NationBuilder, where he is responsible for NationBuilder's presence in Australia. We discussed lessons the NationBuilder team learned in the course of the campaign and the development priorities emerging as a result of those lessons.

Mike Sabat – Mobile Commons

Mike is the Vice President of Business Development at Mobile Commons. Their system is essentially an interface between an existing database of constituents and the device they have readily available at all times on their mobile phone. The Mobile Commons system uses Short Message Service (SMS), so it is not reliant on smart phone technology.

Mike was keen to share the successes they had achieved in the mobile space during the campaign, including approaches taken by not-for-profit organisations using their systems.

Matt Van Horn– Path

Matt is Path's Vice President of Business. He is a futurist and a communications strategist who also worked on the 2008 Obama campaign. Matt spoke about the limitations of online engagement, not just by politicians but by any organisation seeking social change.

Matt Thompson and Ben Bullock– Blue State Digital (BSD)

Matt is BSD's Senior Vice President of Business Development, and Ben is Vice President of Strategy. Blue State Digital was founded by Joe Rospars, who served as the Digital Director for Obama's 2012 campaign. The BSD team were intimately involved with the 2012 campaign, as well as 30 major down ticket races; Senate, House and Gubernatorial elections.

We had a detailed conversation about the strategy and logistics of the 2012 Obama for America campaign particularly the use of information generated by the campaign to guide all decision making.

Katie Harbarth– Facebook

Katie is an Associate Manager of Policy at Facebook. She previously worked for the Rudy Giuliani Presidential Committee and the National Republican Senatorial Committee.

Katie extensively documented the 2012 digital campaign, and explored the successes and failures of the OfA campaign in considerable detail.

Sonal Bains

Sonal is a Digital Strategist and works as the Social Media director at Access Now. She has a background in political organising and communications.

Sonal discussed the tools used to measure effective social media campaigns, such as Row Feeder. She also spoke of the changing way users treat their own information. 'Data has become transactional.' People are now accustomed to getting something for providing their information, so educating users about the intended use of their data, including clear, plain language privacy policies, is vital to establish trust.

Ed Coper – Avaaz

Ed Coper is an experienced Australian digital campaigner, having worked with GetUp!, Avaaz and MoveOn. He worked on the campaign to combat voter suppression in the 2012 election.

Ed saw the 2012 campaign as a progression from 2008, rather than a revolution.

Mark Belinsky – Crowdring

Crowdring is a platform Mark has developed for engaging people with campaigns using mobile devices. It is still in the early stages of refinement.

Every telecommunications market is different, so not everything would apply directly to every campaign environment. Mark detailed the campaigns he has been involved with and his thoughts on the election.

A winning digital campaign

OfA's digital campaign was built to succeed from the outset. The campaign aggressively recruited expertise, and carefully siloed responsibilities. All assumptions were cast aside. Established best practice was nothing more than starting point.

Anything that worked well in the past was tried, but it was not adopted until effectiveness was demonstrated. Skilled and experienced campaigners designed the campaign, but their views on how to execute the campaign were only as valued as the success they attained. Keeping pace with the changing environment was a constant battle. Some systems remained effective throughout the campaign, others benefitted from continual tweaking. Every action was a learning opportunity to make the next action betting.

As noted above, the four standout facets of the Obama for America digital campaign were:

- Digital infrastructure;
- Data management and deployment;
- Mobile technologies; and
- The use of Facebook.
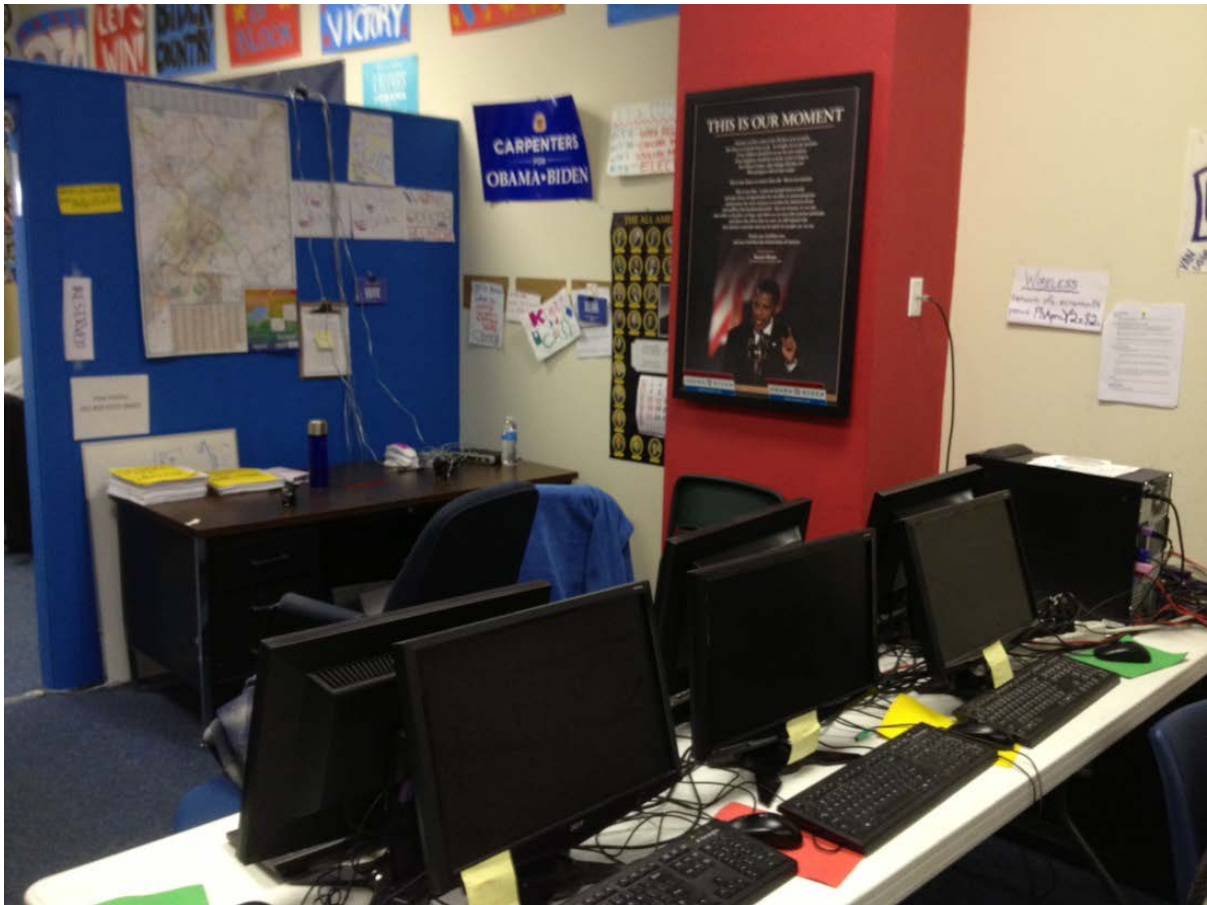
Infrastructure

The 2012 OfA technology team built a system powerful enough to address the shortcomings of the previous campaign and open enough to allow the campaign to innovate and adapt to situations as they arose.

Chief Technology Officer (CTO), Harper Reed, oversaw a group that included experienced digital engineers from top tier companies such as Amazon, Google, Facebook and others. The team focused on technology infrastructure that was flexible, reliable and scalable.

The Obama team's 2008 success – success credited in no small part to their use of digital technology – overshadowed a substantial flaw in their digital infrastructure. There was no centralised system to coordinate the information the campaign collected, and distribute it to those that could make best use of it. Volunteers making phone calls through the 2008 Obama website were working off information that differed from the information used by callers in the campaign office. Contact lists with considerable crossover were never matched, such as get-out-the-vote lists and fundraising lists.

The Obama team built Narwhal—a set of services that acted as an interface to a single shared data store for all of the campaign application.

Everything interfaced with Narwhal, applications were not dependent on other application.

These applications were developed to assist every facet of the campaign. They included:

- Dreamcatcher, an analytics program which was developed to collate all information about individual voters, to facilitate "microtargeting";
- Dashboard, the "virtual field office" application that helped volunteers communicate and collaborate the various ground-level tasks of the campaign;
- Call Tool, a way for supporters to join specific affinity-group calling programs to conduct outreach to those groups;
- Identity, the single-sign-on application that tracked volunteer activity across various activity, and displayed leaderboards. These leaderboards allowed volunteers to compete with one another by completing more tasks; and
- A system to monitor Election Day incidents in real time, so the campaign team could anticipate where additional support such as legal teams needed to be deployed.

In creating these tools the team needed to ensure that they were used throughout the campaign, which necessitated them being responsive and pleasant to use. The team very quickly addressed criticisms and constantly improved the applications.

Tools were developed in response to campaign tasks. The technology team were not the campaigners. They were engineers responsible for building the systems and keeping them working. They responded to the needs of the campaigners, they did not attempt to dictate those needs. If the campaigners needed something, they found a way to make it work.

The tools successfully became a core part of the campaign, so reliability was essential. Infrastructure was not deployed unless it had been demonstrably reliable at scale. Fail-safes and redundancies were built into the system, and it was constantly tested for weaknesses. This reliability was tested during Hurricane Sandy, when the team made a contingency plan that involved replicating 500 server instances in preparation for a redeployment in a West Coast data centre, all without any interruption to the services being used.

Data

Digital infrastructure enabled the collation and use of huge amounts of information, but it was the cultural adaption within the OfA team to a data-driven decision-making process that was key to the success of the campaign.

The new-for-2012 comprehensive data file guided the campaign to find voters and supporters and engage them. The system also included algorithms for predicting which demographics would be persuaded by which appeals.

The data set was assembled from voting records, consumer data and other sources such as Facebook to give analysts as complete a picture as possible. Particularly for younger users, data has become 'transactional', they are accustomed to getting something for providing their information. The call lists in field offices ranked names in order of their persuadability and likelihood of voting for the President, as well as standard information like names and numbers.

Most of the determining factors in establishing how persuadable a contact was were basics such as age, gender, race and location. The modelling honed those factors further, so the campaign could strongly predict people who were going to volunteer, or donate online, or people who were going to

give through mail. A simulation of election day based upon all available information was run each night, which informed decisions the campaign then took. The polling that generated this data was as locally targeted as possible, and then collated to provide a picture of the national situation.

The system had 125 million voter contacts, and relevant data was made available to every level of the campaign that needed it.

Data modelling allowed the campaign to be more efficient in every facet, and get the most out of every resource, whether it was an email communication, a major media buy, where to locate a campaign field office, or where to stage an event and with whom.

The challenge was distilling the wealth of information into decisive action. That required data analysis and interpretation skills and creativity. Every single campaign action taken on the strength of that data was then itself recorded, analysed and improved.

Politics was the goal, but political instincts were no longer the means.

By the end of the campaign the data set and the systems to respond to it were so sophisticated that the team was able to 'micro-target' smaller and smaller groups of people, with the ultimate aim of delivering the perfect message to each individual voter.

Mobile

One of the key instruments in engaging potential voters, supporters and volunteers was through mobile applications and communication.

Mobile-friendly websites, smartphone applications and SMS messages were utilised to raise funds, grow the contact base and make on-the-ground campaigning more effective and efficient.

A principle component of the website design was 'responsive' design - ensuring visitors received a good experience regardless of the device they were using. This became increasingly important as the campaign rolled on, because any event that the campaign seized on was time sensitive. The most current and time sensitive issue-focussed emails had a high response rate immediately, and as many as 50 per cent of those respondents did so using a mobile device.

Many of those urgent actions were tied to a donation appeal, so the team developed a Quick Donate program, which allowed repeat giving online or via text message without a user having to re-enter credit card information. These donors gave about four times as much as other donors.

Mobile web content was kept simple and action-based. This allowed users to immediately engage with the campaign. It was effectively a portal for people to 'remote control' their involvement, wherever they were.

Whilst a substantial focus of the mobile campaign was on smartphone users – 53 per cent of the US mobile market – additional strategies to engage with other phone users were required.

These people tended to be less likely to use their email address frequently. 30 per cent of all email accounts in the US are checked once a week at most. These users were the target of an SMS campaign. There is no need to monitor 'open rates' on an SMS message in the same way campaigners do with email appeals, because almost all users read almost every message as it

arrives. 90 per cent of Americans have their mobile device within three feet of themselves at all times

SMS was also effectively used to augment prior communication on other platforms, and expand contact lists. Recipients of campaign SMSs were far more likely to take the requested action than a user that just received an email, and two or three times more likely to donate, using the Quick Donate system.

List building via mobile can be very rapid. A well-timed 'invite a friend' appeal can generate two additional contacts for every recipient. The recipient replies with names and numbers, that data then goes into a 'hold', and is activated if that new contact replies with an opt in response. This "SMS as CRM" system allows for events and advertisements to serve a similar function to an online form to gather information from contacts.

Lowering the barriers to participation as much as possible allows that first interact, and the relationship between the contact and the campaign can grow from that point.

It was essential to get campaign messages into the pockets of voters, particularly young people. 37 per cent of all mobile users, and over 50 per cent of 18-24 year olds discussed the election on their mobile device.

Facebook
Facebook is the dominant social network in the US, with over 190 million users.

The peer to peer nature of Facebook made it the ideal platform to most closely replicate the field office o-the-ground campaign work in an online environment.

Prior to this campaign, Facebook had been losing effectiveness as a campaign tool, because many users would not follow through with messages actively. Having users participate in a campaign by changing their Facebook status did not significantly alter behaviour. The prevailing expectation among increasing amounts of Facebook users was that if they had uploaded a Facebook status, the message contained within it had been understood by their friends. Evidence gathered by the OfA campaign demonstrated that this was not the case. Broadcasting a message in that way was not a reliable indicator of the audience engaging with the message or taking the action the message sought

OfA designed a Facebook application specifically to reach potential voters and supporters that they had no other access to, and actively engage them.

A phone call or knock on the door from someone familiar is far more effective than appeals from out-of-state volunteers or robo-calls. The Facebook application enabled supporters to connect to their friends and actively encourage them to engage with the campaign.

More than one million Obama supporters installed the application, granting the campaign access to their Facebook friend lists. This enabled the campaign to establish contact with approximately 85 percent of the voters that they lacked phone numbers or email addresses for.

More than 600,000 supporters followed through with more than five million contacts, asking their friends to register to vote, give money, vote, or look at a video specifically designed to change their mind.

Around one in five people personally contacted by a Facebook friend acted on the request, in large part because the message came from someone they knew. Teddy Goff, the Obama campaign's digital director, said "I think this will wind up being the most groundbreaking piece of technology developed for this campaign".

As well as the Facebook application, the campaign team was disciplined about the way they used Facebook itself, from the Barack Obama and Democrat Facebook Fan pages.

Facebook content that was most engaged with was an image, with a short sentence and a call to action. The campaign team focussed on the visual, and gathered extensive amounts of analytical data to determine which content was most popular with which demographic. They honed this targeting right up until and including election day.

Facebook advertisements were targeted to friends of friends of the Barack Obama Facebook page, and the team used geo-targeting down to an individual's postal code to tailor the message delivered by the advertisement.

Stories appeared in the newsfeed of Facebook users based on Facebook likes, and they were also augmented by 'sponsored posts'. Talking about topics other users are talking about also put the page into newsfeeds. The Obama campaign did this particularly well.

The Facebook Registration plugin for sites allowed Facebook users to have details pre-filled in on forms on other sites, increasing the completion of those forms.

The pervasive popularity of Facebook, the sheer volume of data Facebook collects about its users, and the open sharing nature of the platform, made it an essential part of the campaign system in 2012.

Statistics from Obama for America
125 million voter contacts were in the system.

Number of Barack Obama Facebook friends on Election Day 2012: 32,313,965.

Number of Facebook users who downloaded Obama's Facebook app: one million.

Number of @barackobama Twitter follower on Election Day 2012: 22,112,160.

Total number of direct voter contacts claimed by the Obama campaign in 2012, including personal calls and door-knocks, not counting robocalls: 150 million.

Number of those that occurred in the last four days of the campaign: 25 million.

For the 583 day period between Reed commencing the project and election day, the total downtime for the OfA system: less than 30 minutes.