To What Extent Was the Internet a Factor for Barack Obama in Becoming the Democratic Party’s Nominee for the 2008 US Presidential Elections?

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Abstract

Barack Obama’s use of a bottom-up, grassroots, and online campaign strategy disrupted the political norm, and caused the failure of Hillary Clinton’s top-down campaign in the 2008 Democrat primaries.

This paper will apply Clayton M. Christensen’s theory of disruptive innovation as set out in his book, The Innovator’s Dilemma: When New Technologies Cause Great Firms to Fail, to examine how Barack Obama, was able to secure the 2008 Democratic Party’s presidential nominee over Hillary Clinton, the presumed front-runner for the nomination since the 2004 presidential election. The paper will examine how Clinton’s top-down campaign style, which was arguably one of the best-run campaigns in US Presidential history, was not able to compete with Obama’s bottom-up approach to campaigning. The success Obama’s campaign had in connecting and organising supporters as well as in fundraising, was made possible primarily due to the disruptive innovation brought about by the internet and Obama’s belief in the power of grassroots organising. This was a fulfilment of a paradigm shift towards the internet; arguably the most significant change in US political campaigning since 1960 when John F. Kennedy defeated Richard Nixon because of a greater understanding and successful utilisation of the powers of television.

Keywords: The Innovator’s Dilemma, Disruptive Innovation, Barack Obama, Democrat Primaries, 2008 Presidential Election.
Introduction

“We just made history. All of this happened because you gave your time, talent and passion. All of this happened because of you. Thanks” (Barack Obama, 5 November 2008)

(This was the tweet that Barack Obama sent on the 5 November 2008, just after he gave his acceptance speech after winning the election to become the 44th President of the United States of America.)

This paper will not focus on the presidential election between Barack Obama and John McCain, but instead will focus on the election that happened before that: the 2008 Democratic Party presidential primary. The race to be the Democrat presidential nominee between Barack Obama and Hillary Clinton was the longest and closest primary in living memory (Balz 2011: 161), and was so close that it needed to be settled by the Democratic Party’s superdelegates (Balz 2011: 140). While Clinton won the popular vote, Obama’s strategy helped him surpass 2,117 delegates, which is the threshold to become the Party’s nominee.

Before this election, political campaigning was dominated by top-down electioneering and Clinton was in a better position than any other candidate to benefit from this (Tumulty 2008). During the election she did everything right according to the old ‗playbook’ of presidential election campaigning. When Clinton said, ―I’m in and I’m in to win‖ it would take a lot not to think she would be President. The question is: ‘How did Hillary Clinton manage to lose to Barack Obama?’ This paper will look at this question through the theoretical framework of The Innovator’s Dilemma, as proposed by Clayton M. Christensen in his 1997 book, and explain how Barack Obama was able to defeat Clinton with the use of disruptive innovation in his campaign.

This paper will look at what role the internet had on the 2008 Democratic primaries, and why Clinton was not able to take advantage in the same way Obama did. The paper will argue that Clinton was faced with the innovator’s dilemma, and was unable or unwilling to embrace new and disruptive technologies whereas Obama gained a significant advantage with his campaign’s understanding and use of the internet (Stirland 2008b)—The advantage being a fully funded, bottom-up, grassroots movement in every state (Grove 2008).
In the first chapter of this paper there will be an extensive look at the research that has gone into looking at the role of disruptive innovations and who is set to benefit from them. This chapter will review the history of disruptive innovations research that led Christensen to ask ‘How can great firms fail?’ In his book *The Innovator’s Dilemma*, Christensen highlights two types of innovation: sustainable and disruptive (Christensen 1997: xv). While the incumbent and larger firms can deal very well with sustaining innovation, they frequently come unstuck when there is a wave of disruptive innovation. The chapter will put in to context the positions of Clinton and Obama campaigns when they announced their candidacies in 2007.

Clinton’s campaign had all the advantages a dominant firm would have, and she ran an incumbent campaign as she was the clear frontrunner. This is in contrast to Obama who was a junior senator with two years’ of experience in national politics. He had given one notable speech at the 2004 Democratic National Convention, and had written two books (Carr 2008). Obama had little experience and even less personal wealth (something that is traditionally needed for an outsider strategy). Vernon Jordan a senior figure in the civil rights movement, told Obama that he would support Clinton in 2008, saying, “I don’t think this is your season” (Remnick 2010:484) and that he was “too old to trade friendship for race” (Remnick 2010: 485). Obama realised that he would have been unable to run a successful top-down campaign in a traditional sense due to Clinton’s dominance, so the campaign was run as a grassroots, bottom-up campaign based on Obama’s experience as a former community organiser (Clayton 2010: 105). With the use of the internet Obama was about to be competitive in every state, a method Howard Dean tried in his 2004 presidential campaign to take on that year’s party favourites (Kornacki 2008). This method would take advantage of the Democratic primary and caucus rules of dividing delegates proportionally. Knowing that the Clinton campaign would write off smaller states (Harfoush 2009: 28), Obama’s strategy was able to achieve landslide victories in these small states and keep in touch with Clinton in the big states in order to construct electoral success in the aggregate (Clayton 2010: 92). But Clinton’s dominance and brand name was such that Obama would need not only expand the electoral map, but also the electorate. Obama’s campaign Youth Director said that the campaign had a mantra, “If the same people show up that always show up - we're gonna lose” (Dickinson 2008). The campaign needed to build a new coalition.

This leads to Clinton’s dilemma. Christensen notes that the decisions made by large and successful companies, were made at a time when they were considered the ‘best companies in
the world’ (Christensen 1997: xii). In US politics, Clinton was the candidate to beat in 2008, she was the dominant firm. Clinton had everything a politician running for the US presidency could want in traditional terms. While it was clear that the internet would play a part in the election, most political analysts, including Joe Trippi took the view that Joseph Schumpeter would have taken, and thought that it would be Clinton who benefitted from these new innovations (Senior 2005). She had the resources to fund a website that was at the cutting edge, but her campaign missed out on the true potential of the internet: to organise supporters effectively in 50 states for a relatively small amount of money. Christensen lays out four principles of disruptive innovation; these are: companies depend on customers and investors for resources; small markets do not solve the growth needs of large companies; markets that do not exist can not be analysed; and technology supply may not equal market demand (Christensen 1997: 99). The first chapter will look at these four principles in detail and apply them to both campaigns to show why Obama was in a better position than Clinton to take advantage of the disruptive innovation.

The second chapter of this paper will look at the implications of Barack Obama’s use of disruptive innovations in the 2008 Democratic presidential primary race. The paper will argue that against all odds and expectations going in to the contest, Obama’s use of disruptive innovations, powered by the internet, out-funded and out-organised the established frontrunner: Clinton. This chapter will breakdown the key moments of the campaign; from the surfacing phase, the Iowa caucus, Super Tuesday, and the shift in February, and Clinton finally conceding in June. There will be particular attention to the 50 state strategy, the raising and spending of money by Obama and Clinton, and the impact the internet had on this. This chapter will show how the top-down campaign of Clinton was outmanoeuvred by Obama’s grassroots, bottom-up campaign in the race for delegates and eventually the nomination.

In the same way as JFK’s campaign was the first to understand and use the power of television—especially televised debates—in the 1960 presidential election to overcome Richard Nixon, Obama’s campaign understood and used the remarkable fundraising power and organisational means of the internet to win the Democratic Party’s nomination, and eventually the presidency. While future candidates will be able to learn from Obama’s 2008 campaign, established frontrunners will have to pay particular attention to how they address the next disruptive technologies or face a similar fate as Nixon in 1960 or Clinton in 2008.
1. The Innovator’s Dilemma: Clinton the Incumbent & Obama the Start-up

“Disruptive technologies bring to a market a very different value proposition than had been available previously.” Clayton M. Christensen (1997: xv)

“What I'd felt was that we could try some things in a different way ...we didn't have to unlearn a bunch of bad habits.” Barack Obama (cited in Tumulty 2008)

This chapter will examine the theory of disruptive innovation that Clayton M. Christensen sets out in his 1997 book, *The Innovator’s Dilemma: when new technologies cause great firms to fail*. Christensen’s theory will provide the framework that will be used to explain and examine how Hillary Clinton, the frontrunner and presumptive Democrat nominee since the previous election in 2004 (Pollster.com 2008) was not able to take advantage of the disruptive technologies that Barack Obama used to form a network of supporters in all 50 states and organise them to secure him the nomination.

**Disruptive Innovation**

Christensen’s theory about disruptive innovation in *The Innovator’s Dilemma* is built upon research that explores the effect of disruptive technologies and creative destruction. In 1942, Joseph Schumpeter published *Capitalism, Socialism, and Democracy*. Schumpeter theorised that the disruptive innovations (or ‘creative destruction’ as he puts it) would be needed for a new firm to overtake a monopoly, but he was sceptical if a new firm could do this and thought instead that it would be brought about by the existing, bigger and possibly monopolistic firm (Diamond 2006: 121). Schumpeter believed “big-is-better” and that this firm with the monopoly, and also the greatest resources and expertise in the industry, would be forced, and was in the best position to explore and take advantage of these disruptive innovations due to the threat of new firms in the market (Diamond 2006: 122).

Arthur Diamond refers to Scherer’s 1965 study, *Firm Size, Market Structure, Opportunity, and the Output of Patented Inventions*, where he asserts that “the results suggest that Schumpeter’s assertions in *Capitalism, Socialism, and Democracy* were more wrong than right. “Giant monopolistic corporations were not uniquely efficacious engines of
technological advance” (Diamond 2006: 133), this claim is supported by the research in Foster and Kaplan’s book *Creative Destruction* (2001) that showed that large firms regularly fail, contrary to what Schumpeter would expect. Foster and Kaplan showed that of the 100 firms on Forbes’ list of the largest US firms in 1917, 61 did not exist by 1987. Of the 39 that did exist, only 18 were still in the top 100 list (Diamond 2006: 134).

This high failure rate led Christensen to set out to answer the question of “How can great firms fail?” Christensen’s book, *The Innovator's Dilemma: when new technologies cause great firms to fail*, addressed just this very topic. In *The Innovator’s Dilemma*, Christensen sets out to examine and explain how and why “well-managed companies that have their competitive antennae up, listen astutely to their customers, invest aggressively in new technologies, and yet still loses market dominance” (Christensen 1997: ix). The book itself won the Financial Times’ Global Business Award for being the “best business book” for 1998 (Diamond 2006: 136); Christensen has gone on to research and write more books in this field. This book was not just academic theory however; Christensen gives examples of this happening time and time again in the computer hard drive industry, and another example from the earth excavator industry. In the 2011 biography of Steve Jobs written by Walter Issacson, it was noted that Jobs was influenced by Christensen’s *Innovator’s Dilemma*. Christensen’s work would give Jobs the confidence to bring out a new product that would cannibalise the profits of his own existing products. The iPhone dramatically cut the sales of the iPod, and the iPad reduced the sales of the MacBook range; of this practice Jobs said, “If you don’t cannibalize yourself, someone else will.” (Issacson 2011: 408) This approach has made Apple, under Jobs’ leadership, the most valuable company in the world (Passikoff 2012).

Companies that are at the top of their game, like Apple, are most at risk from disruptive innovation. Christensen’s notes that there is a common theme in this failure, “that the decisions that led to failure were made when the leaders in question were widely regarded as among the best companies in the world” (Christensen 1997: xii). In fact, it was the good management that “was the most powerful reason they failed to stay atop of their industries,” and that it was precisely “because these firms listened to their customers, invested aggressively in new technologies that would provide their customers more and better products of the sort they wanted, and because they carefully studied market trends and
systematically allocated investment capital to innovations that promised the best returns, they lost their position of leadership.” (Christensen 1997: xii)

“I’m in and I’m in to win”: Clinton Announces Her Candidacy

When Clinton announced her candidacy on the 20th January 2007 she was the clear frontrunner (Clayton 2010: 90), in a position much like an incumbent or dominant firm in a market. Since the previous presidential election in 2004, she had been the only name mentioned with any credibility (Liu 2010: 55). In the polls, forty percent of Democrats had her as their first choice (Pollster.com 2008) and journalists were writing, “What isn’t the question is whether Hillary will run. In Washington, this fact is utterly taken for granted. Rather, the question is who’ll have the nerve to wrestle the nomination away from her?” (Senior 2005). There was speculation that no one had the ability to challenge her for the nomination. Former Senator John Breaux said of her, “Unless someone can push you off the stage, you’re on the stage. No one has pushed [Clinton] off. Is anyone even capable?” (Senior 2005).

Trippi made it clear that he thought “as soon as [Clinton] declared her candidacy, an infrastructure would immediately shuffle into place around her” (Senior 2005). She would have former President Bill Clinton, her husband, on hand working night and day for the campaign; this was closely coupled with her vastly superior name recognition compared to anyone else running. She had the national political experience spanning decades necessary to be president, with 6 years in the senate and 8 years in the White House (Harfoush 2009: 18). The Clintons’ two decades of national politics brought with it a donor’s lists to match (Jones & Vassallo 2009: 16). Clinton would have the top democratic strategist and pollster Mark Penn running her campaign, who was an advisor to Bill Clinton’s successful campaign in 1996 (Liu 2010: 56). This meant that the campaign would have a masterful control of the old media, employing the traditional methods of top-down, command-and-control, ‘push and spin’ methods that had come to dominate American politics since the last wave of disruptive innovation was understood, the television, in the 1960 presidential election by JFK (Dickinson 2008).
“A Certain Audacity”: Obama Announces His Candidacy

In contrast, Obama was a junior senator, with two years experience in national politics when he announced his presidential candidacy on February 10, 2007 (Jones & Vassallo 2009: 21). Obama only had his well-received 2004 convention speech propping up a very short CV, other than this, he had written two books and was not well known outside his own state of Illinois (Carr 2008). Clinton had everything going for her, including a solid lead in the polls when she announced her candidacy. The media, including MSNBC’s Joe Scarborough, felt that Obama would get “ground up and spit out by the unstoppable Clinton machine” (Huffington, Newsom, & Trippi 2008). However, Obama and his election campaign managed to overturn this seemingly impossible advantage. This was even more impressive when the two men running his campaign, David Plouffe and David Axelrod, had never won a presidential nomination, let alone a presidential campaign - and they were going against their Party’s elite (Liu 2010: 56).

Two Types of Innovation: Sustainable and Disruptive

The Innovator’s Dilemma shows that there are “times at which it is right not to listen to customers, right to invest in developing lower performing products that promise lower margins” (Christensen 1997: xii). This is shown well by Christensen as he identifies two types of innovation: sustainable and disruptive (Christensen 1997: xv; Diamond 2006: 137). Sustainable innovation is simply the improvement of existing and established products, often incrementally. The successful company simply listens to their customers and the improvements come “along the dimensions of performance that mainstream customers in major markets have historically valued” (Christensen 1997: xv). Clinton had all the traditional advantages in campaigning and would just bring sustainable improvements to the top-down model. Obama could not compete with Clinton using a top-down model himself; his campaign needed to try something different to win, and the challenge was clear to Obama, he said, “we're up against the most formidable team in 25 years, but we've got a plan, and we've got to have faith in it” (Obama cited in Tumulty 2008). Obama was committed to running a 50 state, grassroots, bottom-up campaign, rooted in his background as a community organiser, and taking advantage of the Democratic primary and caucus system that divided
delegates using proportionate representation (Liu 2010: 67). This would be possible with the use of a very disruptive technology: the internet.

However, disruptive innovation is different, often resulting in a “worse product performance, at least in the near term” (Christensen 1997: xv). The new product brings qualities that had not been previously available, and these features are valued by a “few fringe (and generally new) customers” (Christensen 1997: xv). Products that come about due to disruptive technologies are often “simpler, smaller, and, frequently, more convenient to use” but they can have lower margins and thus lower profits. Christensen touches upon the disruptive nature of the internet (1997: xv) and its potential on every industry in the future.

It is important to understand that “disruptive technologies that may underperform today, relative to what users in the market demand, may be fully performance-competitive in the same market tomorrow.” This leads them to be typically “first commercialized in emerging or insignificant markets” (Christensen 1997: xvii), and because of this “leading firms’ most profitable customers generally don’t want, and indeed initially can’t use, products based on disruptive technologies” (Christensen 1997: xvii). As, “by and large, a disruptive technology is initially embraced by the least profitable customers in the market. Hence, most companies with a practised discipline of listening to their customers and identifying new products that promise greater profitability and growth are rarely able to build a case for investing in disruptive technologies until it is too late” (Christensen 1997: xvii).

Obama’s Disruptive Innovation

In US election terms, this initial ‘worse product performance’ of using the internet to organise supporters was tried by Howard Dean in his unsuccessful 2004 presidential campaign. While starting with much promise and raising $27 million online (Towner & Dulio 2011: 166), Dean eventually came third in the Iowa caucus and dropped out of the race (Jones & Vassallo 2009: 17). Obama, however, saw the promise of this approach and hired Dean’s Online Director, Joe Rospars, to be his Director of New Media. Chris Hughes was brought inside the campaign from the social network Facebook, a company he had co-founded in 2004. Hughes had been in contact with the Obama team before; in the 2006 election cycle, Obama’s office reached out for a special politician Facebook page, even
though Obama would not be seeking re-election for another four years (Schatz 2007) Hughes believed in what the Obama campaign was doing and was looking forward to “taking on some of the biggest names in politics” (Stirland 2008b). Hughes would go on to build a social network for Obama called my.BarackObama.com (which would become known as MyBo) that enabled the campaign to run and support local community campaigns on a national scale – something Obama wanted, but did not know was possible (McGirt 2009).

Obama knew the strengths of a grassroots movement and that the internet had shown, through Howard Dean’s 2004 campaign that the potential was there. Obama used disruptive technology at the heart of his campaign to overcome Hillary’s experience. It would later turn out that “Obama set out a blueprint, timetable, and success that will be tried to be copied for years to come.” (Jones & Vassallo 2009: 36). Trippi said that he believed Clinton’s would be the last campaign to use a top-down style of campaigning, “The Clinton campaign is the last, antiquated vestige of the top-down model. The top cannot organize caucus states; the bottom can” (Dickinson 2008).

Democrat Primary and Caucus Rules

The Democrats introduced primaries in their current form for the 1972 presidential election to open up politics and take control away from the party bosses (Denton & Woodward 1998: 125). In 1976, the primaries’ delegate distribution was changed from winner-take-all to dividing the delegate based on the votes won, more commonly referred to as proportionate representation (Denton & Woodward 1998: 138). This resulted in the Democrat supporters, and not the party elite, having a larger role in selection of the nominee.

Traditional campaigns have targeted the states that had the most delegates, and while the primary reforms made the distribution of delegates proportional on votes, there are a great deal more delegates to be won in the states with the bigger populations compared to the lesser populated states. Obama’s campaign realised the potential importance and value in targeting the smaller states in the primaries, states that had previously been written off by most candidates (Jones & Vassallo 2009: 30). A fundamental element of Obama’s plan was to be competitive in every state. While Clinton would write off the smaller states (Kornacki 2008), Obama would try to win them by landslides and pick up a big delegate lead. Due to the
proportionate nature of the delegate distribution, Obama would only have to be competitive in the bigger states, but not necessarily win the popular vote to secure the nomination. For this plan to work Obama would have to put his faith in his grassroots organisation and trust that they would come through for him, his campaign slogan of ‘Hope’ might have been just that.

To organise these caucus victories, Obama would eventually turn to the internet (Huffington, Newsom, & Trippi 2008). The internet had the power to affordably facilitate the organisation of local grassroots in each state, and build his own network of supporters that initially was separate from the traditional Democrat, who was likely to side with Clinton, the established frontrunner (Kornacki 2008). Obama knew from the beginning that if he were going to have a chance of winning he would need to expand the electorate and the electoral map (Tumulty 2008).

Clinton had Harold Ickes on her staff, who was supposed to know more than anyone else on the Democrats’ delegates selection process (Klein, 2008), but a rift between him and Penn may have devalued his input (Baker & Rutenberg 2008). Somehow the Clinton campaign undervalued the smaller and caucus states, following outdated conventional wisdom. Obama would take them with landslides. Obama produced an “unprecedented funding and organising effort... [to] battle [the Clinton] machine into a standstill, then knocked out McCain a few months later” (Huffington, Newsom, & Trippi 2008), he was able to do this as his campaign used the internet to organise in all 50 states.

The Four Principles of Disruptive Innovation

The innovators’ dilemma itself “belongs to the incumbent firm” in the market (Diamond 2006: 137). While Christensen looks at the markets for computer disk-drives and the mechanical excavator industry the same framework can be applied to the 2008 Democratic Party primary race, where Clinton ran an incumbent campaign, whereas Obama utilised disruptive innovation.

Before the candidates announced themselves Trippi believed, much like Schumpeter, that when Clinton announced her candidacy she would benefit from her experience, Bill’s experience, the established national Democrat infrastructure, and that she would be able to
“raise more money than God” (Senior 2005). Trippi speculated how well Bill Clinton would have done in the internet age and how much he would have been able to raise, “would it have been a quarter of a billion, a half a billion dollars?” conceding that it would have overshadowed the amount raised by himself and Howard Dean in 2004 (Senior 2005). In the same interview Trippi concluded that, “if you ask who out there would benefit most from this great sea change of grassroots mobilization, it’s Hillary” (Senior 2005). However, as Christensen has shown, the dominant firm does not or cannot adopt the disruptive technologies.

Richard Davis shared this view in his 1999 book *The Web of Politics: The Internet’s Impact on the American Political System*, “Among candidates, online benefits will accrue primary to the same players who have benefited offline in the past” (Davis 1999: 199-200). Clinton did not embrace the new disruptive technology; Penn said “everybody wants to repeat what’s been most successful for them” (Horowitz 2011). Christensen’s four principles of disruptive innovation can be useful in trying to explain why Clinton could not take advantage of the potential disruptive innovation and shows that when a good company fails it is either that they have “ignored these principles or chose to fight them” (Christensen 1997: xix).

*The First Principle of Disruptive Innovation.*

The first principle is that “companies depend on customers and investors for resources” (Christensen 1997: xix). Steve Jobs, co-founder of Apple, paid particular interest to the work of Christensen and *The Innovator’s Dilemma*, and argued that; "It’s really hard to design products by focus groups. A lot of times, people don't know what they want until you show it to them" (BusinessWeek 1998). The customer only knows what their current needs are, but they should not be expected to know what is coming next in the industry. This means the customers’ demands are for products that exist and not the next potential disruptive product.

Clinton started her campaign with roughly 40% of Democrats supporting her candidacy (Pollster.com 2008; Senior 2005). However, this left 60% of Democrats open to choosing someone else. Clinton provided her supporters with one of the best top-down campaigns ever seen, this is what the traditional Democrat voters expected of a campaign, and traditionally this campaign would have won (Tumulty 2008). This also goes for Clinton’s investors (or
donors), she relied on rich donors to bankroll her campaign, most (70%) donating the maximum legal amount of $2300, and then getting their friends to do the same (Clayton 2010: 95). Dean, as the chair of the Democratic National Committee, was stopped from building a 50 state strategy for the Party in 2006. Rahm Emanuel and others disagreed with the strategy, and persuaded the Party’s big donors to hold off donating until the idea was rolled back (Kornacki 2008). This neglect and undervaluing of a 50 state strategy would be seen again by the Clinton campaign in 2008 and allow Obama to capitalise.

Obama did not have an established base of supporters at the beginning of the campaign, and he was barely known outside the state he represented of Illinois. Obama knew that Clinton would have a lot of the big donors in the Democratic Party which forced his campaign to try new things as he needed to raise money and build a base of supporters in every state that would have to at times run parallel to the traditional Democrats that supported Clinton (Carr 2008). Obama said that he wanted to “build an organization that reflected my personality and what I thought the country was looking for. We didn't have to unlearn a bunch of bad habits” (Obama cited in Tumulty 2008). As a former community organiser, Obama wanted to build a campaign that harnessed the power of grassroots organising.

Christensen suggests that a way to tackle this problem is for the established firm to create a spinoff company that has an aim to make a profit in this new market. Obama gave Rospars and Hughes almost free reign to experiment in building an online community for the use of his campaign. This online community, MyBo, was a driving force behind the organisation of his landslide victories in the caucus states.

*The Second Principle of Disruptive Innovation.*

The second principle is that “small markets do not solve the growth needs of large companies” (Christensen 1997: xx). Christensen shows that as a company gets larger and successful it becomes increasingly difficult to enter emerging markets for various reasons. The new markets that disruptive technologies create often start off very small. These insignificant markets do not appeal to the large companies as they need to invest in areas where they can expect to make large returns to satisfy their need for constant growth.
Clinton’s campaign preparations could have feasibly been in place since her husband, Bill Clinton, left the White House in 2001, if not sooner. Even in George Bush’s first term as president there was speculation that she would run in 2008 (Liu 2010: 55). Clinton already had a ‘turnkey’ operation set up (Remnick 2010: 443) that meant her plan may well have been conceived in advance of 2004, and not taken in the full implications of the work done by Howard Dean’s campaign regarding online fundraising or organising. Clinton’s campaign focused too much attention on attracting the big donations and undervalued the potential role of small donors. Picking up donations of $5 or $10 from a few Americans would not have appeared to be a worthwhile endeavour for Clinton as she was attracting millions from her ‘Hillraisers’ (Clayton 2010: 95). She already had the infrastructure and people in place on the ground in the bigger states to win them (Remnick 2010: 443).

While Clinton’s campaign might have dismissed Dean’s campaign progress as insignificant or a failure as he did not win, Obama saw the potential of grassroots organisation in all 50 states. The internet was a growing medium that had already disrupted a number of other industries, notably the music and book industries. In 2008, more than half of the US population were using the internet (Clayton 2010: 138; Smith, A 2009).

While Hillary was the frontrunner back in 2004, Obama was not even on the national scene. Christine Pelosi, the daughter of the 60th speaker of the US House of Representatives Nancy Pelosi and a Democratic Party political strategist, believes that every campaign must be run like a business start-up that has a limited period to build support and communicate a message to win. (Burton & Shea 2010: 196). Obama’s campaign was run like a start-up (Carr 2008; Maarek 2011: 1) and so was able to enter the market first and benefit from first mover advantage. The campaign was started in 2007, after conversations in late 2006 about the possibility, “with limited resources and name recognition” (Clayton 2010: 138); to have a chance Obama’s campaign would need to grow quickly, raise a lot of money, and out organise Clinton. While Clinton could bulldoze her way to victory, Obama did not have the luxury of making too many mistakes, especially early on when he was trying to build his credibility (Harfoush 2009: 14). Obama managed to create the feel of a movement or insurgency with the organisational “efficiency of a corporation.” (Tumulty 2008). The campaign stayed nimble and agile, allowing it to grow in areas that were proving promising and find success, something that Clinton or McCain could not do (Grove 2008).
If these new markets grow and start to look interesting to the larger firms it is often too late to compete with the newer start-up who, by that time, has a great deal more experience in the market and understands the disruptive technology better than the larger firm. By the time Obama’s advantages became clear, he had already had the infrastructure in place online and on the ground for months, it was far too late for Clinton to catch up. In part this was because Clinton did not plan for a campaign to go past Super Tuesday, she said, “It’s not a very long run, it’ll be over by February 5” (Berman 2008).

*The Third Principle of Disruptive Innovation.*

The third principle is that “markets that don’t exist can’t be analysed” (Christensen 1997: xxi). This is a problem for disruptive innovation and thus the crux of *The Innovator’s Dilemma*. It is difficult for a large company to invest in a technology if they cannot carry out market research on potential markets. A good company would conduct market research and plan thoroughly before placing resources into a new endeavour. Planning for success does not work as well with disruptive innovation; instead structures should be set up to enable discovery-based learning, so changes can be made quickly as the project progresses and as the company learns from past successes and failures. As the uses for disruptive technology are sometimes unknowable in advance, being able to fail and learn is important in a new market (Christensen 1997: 99). Larger companies who have experienced great success in other markets may place a large stigma on failure, which may hold them back from taking full advantage of these new markets (Christensen 1997: 99). The potential of the internet was questioned when Dean’s campaign failed to get out the vote in Iowa, and his campaign came to an early end (Schatz 2007). In 2006, there was a feeling of, “Howard Dean was the [i]nternet. Howard Dean lost” (Dickinson 2008) which would contribute to the internet’s association with failure. The Obama campaign initially downplayed the role of the internet so as not to be labelled “The next Howard Dean” (Dickinson 2008). Clinton put off entering this next market, this time waiting allowed the Obama campaign to master the technology, by the time Clinton’s campaign saw the value they were not able to catch up (Diamond 2006: 137).

Obama’s campaign learned from Dean’s mistakes and put everything they had into Iowa, they knew that they would have to build a ‘network of Iowans’ rather than bring in supporters from across the country (Tumulty 2008). Steve Hildebrand, Obama’s deputy campaign
manager, said that they had “an initiative to take our online force offline” (Dickinson 2008), the supporters needed to do more than sign-up; they needed to take an active part in the movement. This followed the advice from Hughes of how Facebook grew: ‘Keep it real, keep it local’ (Harfoush 2009: 74). The campaign also knew that they could, with the use of the internet, reach a demographic that conventional wisdom said was not typically politically involved – this would help expand the electorate, and people who typically do not volunteer. The youth vote in particular faces a ‘catch-22’ as Rosenberg puts it, “politicians don’t court young Americans because they don’t vote and young Americans don’t vote because politicians don’t court them (Garcia-Castañon, Rank, & Barreto 2011: 117).

As the market did not previously exist, the campaign had to have faith in the grassroots, and employed discovery-based learning to work out how to proceed (Christensen 1997: 160). The Obama Headquarters gave away a lot of control of their campaign and let the supporters organise themselves, this went as far as giving away their voter lists which are normally a campaign’s closely guarded secret (Clayton 2010: 106). The campaign provided supporters with advice and resources through the internet and then let them get on with the job of campaigning for Obama in every state (Clayton 2010). Dean showed the potential to create “local, decentralised social networks from scratch” (Garcia-Castañon, Rank, & Barreto 2011: 119). While at first the online organising was not considered a top priority, it became clear after Obama lost New Hampshire that the network that Hughes had built would become vital for the campaign (McGirt 2009). However, even after the true potential of this network had been realised it was important that the campaign did not exploit it, and instead let it mature to reap long term benefits. (Fast Company Staff 2009).

The main benefit of discovery-based learning is that even though Obama did not fully realise how powerful and vital the internet would prove to be, “both on the financial side and the organizing side” (Tumulty 2008), provisions were put in place to allow it to happen and let the volunteers take control of the campaign themselves (Tumulty 2008). This methodology was applied with everything being analysed and improved upon, with constant refinements made, to help the campaign (Harfoush 2009: 159).

In 2007, Obama had given his “internet guy”, Hughes privileges and freedoms, similar to the privileges first extended to media advisors in the 1996 election, to build an online community that US politics had never seen before (Denton & Woodward 1998: 108). Hughes had
expertise in online communication that was unmatched by any other campaign and was the reason MyBo became a powerful force in US politics, along with the power of its community. This paper will show how the social network helped organise members to provide landslide victories for Obama in caucus states.

As well as MyBo, Obama had a strong presence on a range of social networking sites (Garcia-Castañon, Rank, & Barreto 2011: 120) – this courted support from potential voters on the very social networks that they were visiting daily, rather than expecting them to come to Obama’s website. Put simply, Clinton’s team did not understand the power of the internet, Obama’s did.

*The Fourth Principle of Disruptive Innovation.*

The fourth principle is that “technology supply may not equal market demand” (Christensen 1997: xxii). While disruptive technologies may start off in small markets, they can quickly become competitive against mainstream products. This again draws parallels to Dean’s and Obama’s campaigns. Certain attributes that made the disruptive technologies unattractive in established markets are often the same ones that provide the value that the consumers want in the new and emerging markets. A 50 state strategy, decentralising the campaign and giving away control to the supporters, goes against all the principles of a top-down, command-and-control campaign (Schatz 2007). Obama needed to build a network of supporters in every state very quickly; the internet facilitated this by connecting supporters locally.

In 2008 the technology had greatly improved and the voters were well versed in using this technology effectively. Obama needed to expand the electorate to win, and put his message and campaign front and centre by canvassing a younger demographic online in an environment they were using every day. It also took advantage of supporters sharing content – some of which the campaign produced and other produced by Obama’s supporters, including singer will.i.am and YouTube star Obama Girl (Clayton 2010: 144) – with their whole friends list, creating a much more trusted ‘referral’ than a paid advert. (Stelter, B. 2008a) MyBo would help the Obama campaign find and mobilise supporters, while initially targeting younger voters (Schatz 2007). As it would happen, the 18-30 demographic increased and matched the voter turnout of the over 50s in Iowa (Clayton 2010: 138), with
the youth vote doubling or tripling the previous records in the Democratic primaries and caucuses.

After Obama successfully used the internet to organise his Iowa caucus win, the same methods and technology were being used across America to organise supporters. Obama had created a network of supporters across all 50 states of America. This all resulted in Obama’s landslide caucus wins, which were simply a show of his campaign’s organisational strength (Tumulty 2008).

While disruptive technology starts off small, such as Dean’s progress in 2004, it does not take much for it to scale up and surpass the existing technologies as Obama did to Clinton’s campaign in 2008 (Lutz 2009). This view is shared by Balz, “technologies that were once novel quickly become staples of political life” (2011: 140).

By the time Hillary Clinton’s staff realised the potential of a grassroots movement to campaign, organise and fundraise, it was too late. Clinton did not have the staff with the understanding to implement an online strategy as Obama did. Obama’s campaign had been nurturing their grassroots supporters for over a year, even before they realised the true potential of such a network, and now it was paying dividends. The next chapter will look at the implications of the disruptive innovations used by the Obama campaign.

2. The Implications of Obama’s use of Disruptive Innovation

“Were it not for the internet, Barack Obama would not be president. Were it not for the internet, Barack Obama would not have been the nominee.” Arianna Huffington (Speaking at Le Web ’08. Cited in Huffington, Newsom, & Trippi 2008)

The implications of Barack Obama’s campaign’s use of disruptive innovation are twofold: firstly, in being able to raise enough money to be competitive against Clinton in a traditional sense; secondly, the campaign was able to organise supporters and be competitive in every state. It is difficult to separate Obama’s fundraising and his organisation efforts in the 2008 primaries due to his use of the internet which ultimately provided him with a feasible way to conduct a 50 state strategy as he was out-fundraising and out-organising Clinton’s campaign.
Ultimately, as Clayton puts it, Obama “has rewritten the rules on how to reach voters and raise money” (Clayton 2010: 147).

The way Obama’s campaign was set up was conducive to raising small amounts of money from a large range of people online; online donors provided phone numbers and zip codes, allowing the campaign to connect to people at a hyper local level. Pete Rouse remembers, “the grassroots model wasn’t really a choice. It was a necessity. Clinton would have the establishment behind her, which meant that she’d have the early money (or so it was thought), the endorsements and a national organization” (Newsweek Reporters 2008). Obama was able to make the outsider strategy work as he believed in the power of grassroots organisation, but also circumstances left him with very little option, as running a top-down campaign against Clinton would have likely not been successful (Tumulty 2008). However, if Clinton had taken the right advice and had put in place measures to compete in every state, something that the internet made easier and cheaper than ever before, Obama’s strategy would have had less of a chance to build up large delegate leads in smaller and caucus states (Grove 2008). It was the Clinton campaign’s shortsightedness, especially in expecting a short primary season, which led to her downfall. (Green 2008). This chapter will look at the 2008 Democratic Party primary race and break down Obama’s use of disruptive innovation to secure the nomination.

The Surfacing Phase

The vital role of money in American presidential elections is clear. Jesse Unruh, a Democrat politician, described money as the “mother’s milk of politics” (Clayton 2010: 21), other see it as a proxy for votes (Parker & Pishevar 2011). If money is the lifeblood of American politics (Clayton 2010: 111), and thus necessary for Obama to compete against Clinton, he would need a large war chest. Even before Clinton announced her nomination there was speculation of her potential. In 2005 a journalist wrote, “she is Hillary. Think about how much money she could raise. How energized the base would be” (Senior 2005).

Howard Dean, with the help of Joe Trippi, raised more than John Kerry and John Edwards in the 2004 primaries (Kornacki 2008). Trippi thought a Clinton using the internet could greatly outraise Dean, in the range of “a quarter of a billion, a half a billion dollars” (Senior 2005). In
April 2007, Clinton announced that she had raised $26 million in her first quarter of campaigning (Clayton 2010: 95); this was added to the $10 million she transferred from her 2006 Senate race. $10 million of the $26 million came during a one-week period where she and her husband, former President Bill Clinton, held huge gala dinners and raised $4.2 million online (Kornblut 2007).

Clinton also had her ‘Hillraisers’, supporters that were tasked with raising $1 million dollars each for her campaign. These ‘Hillraisers’ were often public figures in a range of positions from entertainment to sport and government to private business (Clayton 2010: 95). Clinton got off to the start she would have expected.

The 50 State Strategy

A 50 state strategy is when a candidate chooses to try to win, or at least be competitive in every state. The strategy is as much an investment in the future of the party as it is a method of winning an individual election. Before a candidate can think about winning a state, they must have a presence there. Obama, building on the work of Howard Dean in 2004, had paid staff members in every state. This strategy was criticised in 2004 and 2006, as it involved putting money into states that had traditionally voted for Republican candidates. However, in 2008, powerful online tools, mainly MyBo, allowed Obama to connect his supporters locally in every state, provide them with resources, and make them organisers so that they could take control of the campaign in their community (Schatz 2007).

Emails

From very early on, the Obama campaign collected email addresses and zip codes from every state at every opportunity (Goetzl 2008), which was essential for Obama’s 50 state strategy (Denton & Woodward 1998: 135). This helped both the local organisational side of the campaign, but also with fundraising. To attend Obama’s speeches a valid email address was needed, with Obama speaking to stadiums full of people his email list grew quickly (Penenberg 2009: 17) and the online community stemmed from offline activities. The campaign ended up with 13 million email addresses (Lutz 2009), which they could use to
build individual relationships with each voter tailored to their state of residence (Burton & Shea 2010: 218). The campaign monitored how involved the person was with the campaign and how much they had donated. This meant the campaign could send personalised messages to individual people asking them to give a little bit more money or time than they had previously. If someone attended an event, they would be asked to perhaps volunteer at the next one, or make a phone call, and eventually donate money (Harfoush 2009: 32). The new media team was very careful in letting the community grow and not simply using it to raise money right out of the gate, like the fundraising department might have wanted to. Stephen Geer, who was Obama’s director of email and online fundraising, said that “the list we built played an unprecedented role in this campaign” in raising money and getting out the vote (Goetzl 2008). The main advantage of email over direct mail is that is fast and free. Content can go from Obama’s mouth to a supporter’s inbox in seconds (Harfoush 2009: 100). However it is important to remember the reach of emails: not everyone has email and some segments of society still prefer post or television adverts.

*MyBo: Obama’s Social Network*

MyBo first targeted the elusive 18-30 demographic who were more educated and technically savvy (Clayton 2010: 153). These people were crucial to the new coalition Obama built as he moved away from traditional top down politics (Clayton 2010: 24). Obama rallied a new generation to engage with politics, especially through his use of social networks, targeting the young where they feel comfortable. The campaign took a section of the electorate (18-30) who barely vote, increased their turnout, and also turned them into a force that could organise and campaign (Clayton 2010: 143). No presidential campaign had created an online social network before, but this is unsurprising, as online social networks had not disseminated into society until after the 2004 presidential election. In 2008, Facebook had received staggering growth among university students and was expanding among the wider population; if there was a concern about how to reach the 18-30 demographic, a lot of them were on Facebook. Hughes knew the limitations of Facebook, and that for the campaign to fully utilise its potential, they needed their own social network: my.BarackObama.com (MyBo) was created (Schatz 2007). MyBo was created to expand the campaign’s “power to find and mobilize supporters, particularly elusive young voters who go to the polls at much lower rates than
their elders” (Schatz 2007). In 2004, 47% of the 18-30 demographic voted, in 2008 this increased to 53%. In the primary race the same demographic doubled or tripled their participation rates (Dickinson 2008). Expanding the electorate takes risks on the younger demographic being able to expand or turning out to vote. A relatively small number of people, abstentions, and undecided voters decide elections but these people are also the hardest to reach (Maarek 2011: 233) – Obama’s campaign attempted to reach people who normally do not vote. Clinton’s campaign chose not to look at the new techniques, they might not have felt comfortable with them or even fully understood them. Obama brought in people who did, such as Rospars and Hughes, so the campaign could use them effectively.

These tools also lowered the barrier to what was considered participation, allowing supporters to send emails to their friends or phone potential supporters from their own homes (Harfoush 2009: 50). In addition to this, any supporter who purchased merchandise or a ticket to hear Obama speak was treated like a donor, increasing the feeling of ownership on the campaign. Obama message of ‘change’ was reinforced by his campaign that changed electioneering by breaking the norm and targeting all fifty states (Clayton 2010: 105). The supporters in every state were organised locally and given control and freedom to make decisions. The decentralised approach enabled different areas to try different strategies that might be better suited for their local community. MyBo also enabled supporters to share success stories so other members of the community could benefit. While this gave away control of some aspects of the campaign, it eventually ended up benefitting Obama in the caucuses, as he had a stronger grassroots organisation.

MyBo had 1.5 million members and helped organise 200,000 campaign events (Penenberg 2009: 14). In less than two years, the Obama campaign raised $750 million from four million people. Of these individual donations, 90% were less than $100, and half were for $25 or less (Penenberg 2009: 15). These small amounts from 258,000 contributors during the primaries (Clayton 2010: 95) allowed Obama’s campaign to ask for more money via email without the risk of his supporters reaching the legal limit of $2300, which was a problem Clinton faced (Penenberg 2009: 15). Like the 50-state strategy, Obama was following in the footsteps of Howard, raising small donations from a very large base of supporters, and out-raising the party establishment (Stirland 2008b).
Early Money Is Like Yeast, It Helps Raise The Dough

After Clinton announced her total for the first quarter of $26 million, Obama proved that he could compete with his first quarter figure of $24.8 million (Newsweek Reporters 2008). Obama outraised Clinton by the second quarter, posting donations of $32.5 million compared to her $27 million (Clayton 2010: 95). This money came through Obama’s grassroots army donating small amounts online, and the money built up fast (Kornacki 2008).

There is a phrase in American politics: ‘early money is like yeast, it raises the dough’, meaning that raising money early helps a candidate get noticed and thus attracts more money for the campaign (Clayton 2010: 21). During the surfacing phase of a presidential election, the early money that Obama raised through the internet helped him stand out as a credible and serious candidate who had a chance of possibly rivalling Clinton (Delany 2008; Denton & Woodward 1998: 135; Green 2008). The money also increased his visibility and got the media talking about his campaign with more conviction than a two-year senator could normally expect. This was impressive and noteworthy as Obama did not have the deep links to donors that the Clintons had built up over two decades of national politics (Jones & Vassallo 2009: 16).

In June 2007, while Clinton’s campaign was targeting Iowa and the other early primary states, more than 10,000 Obama supporters were organised in every state to canvas their neighbours and to build Obama’s base (Clayton 2010: 144). This was a test of the online community that Obama had built, as they were all organised online.

Iowa: The One State Strategy

What was ultimately a 50 state strategy, was first a one state strategy. Plouffe said that the Obama campaign was focused on disrupting Clinton early and that failure to win Iowa would have handed her the nomination (Liu 2010: 56). Iowa was also described as the “win or go home state” (Dickinson 2008) for Obama’s campaign. After the early fundraising success, it was important for Obama to show he could win Iowa, the state that Dean failed to overcome. If the campaign could prove that they could win there, then they would show that they would have a chance of winning the nomination. The campaign put all its resources into winning Iowa, but thanks to MyBo, attention was still being paid to every other state and these
supporters were quietly organising and waiting for their own primary or caucus to happen, with MyBo’s potential not yet apparent (Berman 2008).

Clinton spent big early as she expected the whole race to be over by Super Tuesday. In Iowa alone she spent $106 million (Clayton 2010: 92), but only came third. Previous to his win in Iowa, at the Jefferson-Jackson dinner, Penn said that “Our people look like caucus-goers” and that Obama’s supporters “looked like Facebook” (Stelter 2008b). This shows that the top of Clinton’s campaign had missed the substantial shift that was occurring in US elections due to Obama’s use of disruptive innovation in his campaign. Obama won Iowa with 38% of the delegates (CNN 2008), but this only told part of the story. Obama had successfully expanded the electorate in Iowa. In 2004, the Iowa caucus turnout was 124,000, but in 2008 it had increased to over 239,000 (Liu 2010: 71). Before the contest the Obama campaign set a target of 97,000 Iowans to pledge their support for Obama, they reached the goal of the morning of the caucus (Tumulty 2008). The next step was for them to show up, and they did; the Obama campaign did not face a similar fate as Dean’s in 2004. While there was a debate to whether Clinton should have competed in Iowa (Simon 2008a), she did, and she put a great amount of time and money into the state, and she was defeated by Obama’s campaign (Simon 2008b). As many under thirties voted in Iowa as senior citizens, something that was unprecedented at the time (Dickinson 2008), ‘Facebook’ was the new face of caucus goers. Iowa was the first contest, but similar events would play out across the country.

Before Super Tuesday Obama had only won Iowa and South Carolina, Clinton’s campaign won the primaries of New Hampshire, Michigan and Florida and the caucus in Nevada, the only caucus Clinton would win (CNN 2008). However, the primaries of Michigan and Florida were moved forward and the DNC deemed them in breach of the rules and thus their delegates were initially not going to be counted at the convention. This allowed Obama to take a slight pledge delegate lead into Super Tuesday, excluding Clinton superdelegates.

Super Tuesday and Beyond

This was going to be MyBo’s biggest test so far. While it was relatively straightforward for the Obama campaign to manage the first six contests, Super Tuesday would see 24 contests happen at the same time. Jon Carson, Obama’s Field Director, described it as an “enormous
leap of faith” (Harfoush 2009: 28) in the power of the disruptive technology. With a presence in all 50 states, the decentralised campaign allowed Obama’s supporters to get on with organising. If they needed help or resources the website could provide much of this.

After a competitive start to the primaries, both candidates claimed to have come out on top after Super Tuesday. Obama won all six caucuses with above 60% of the vote, and in most cases a lot more (CNN 2008). Clinton won 9 of the 16 primaries but none by landslides apart from Arkansas, the state where her husband, Bill Clinton, had been Governor. This was a relatively small state in regards to delegates compared to the state that Obama represented: Illinois (CNN 2008).

The candidates were neck and neck after Super Tuesday, but Clinton and Obama had very conflicting Februarys. Clinton’s strategy had not budgeted for the race to continue past Super Tuesday (Green 2008) and she started to run out of money – this was compounded by the fact that she had not started to organise operations in the upcoming primaries (Clayton 2010: 99). Much like any traditional campaign, 70% of Clinton’s money came from supporters donating the maximum amount of $2,300 (Clayton 2010: 95), meaning they were ‘maxed-out’ and could not donate again until the general election (Clayton 2010: 95). This lack of cash resulted in her writing cheques to her own campaign (Morain 2008). This could have been avoided as in 2006 Clinton spent $36 million on a senate race where she was, for all intents and purposes, unopposed (Fast Company Staff 2009) and could have used this money for her Presidential campaign. This added to other large expenses such as high consultant’s fees (especially compared to the Obama campaign) and rent on a headquarters that expired in spring of 2009. (Kornblut Lessons We Can Believe In 2009). To put this bluntly, Clinton “had no plan, no money and no real grassroots organisation” (Dickinson 2008).

By contrast, Obama’s campaign had been set up with the knowledge that they would likely be forced to campaign against Clinton for the distance - past Iowa or Super Tuesday. Obama was raising unprecedented amounts; he raised $55 million in February of which $45 million was collected online (Green 2008) – the most staggering fact of this is that Obama did not attend a single fundraiser during the month, and raised almost $2 million a day (Penenberg 2009: 15). Obama could spend his time campaigning, talking with people who had yet to make up their mind and convince them to vote for him, rather than with his supporters, who had already made up their minds, to ask for more money. Obama would go on to win the
remaining 11 primaries or caucuses held in February. This is where Obama started to open up a delegate lead over Clinton.

To put this into perspective, Clinton had raised more money than any other Democrat had before, with the exception of Obama, at the point when she dropped out (Maarek 2011: 1). She was running an unsurpassed campaign based on the traditional methods of top-down electioneering employing the best Democratic strategists, consultants and advisors to run her campaign. But, Obama’s new disruptive model for political campaigning was out-raising her, out-spending her, out-organising, her and, most importantly, picking up more delegates than she was.

**Campaign Spending**

In traditional presidential campaign the breakdown of spending is normally: 50% on reaching voters, such as TV adverts or radio spots; 10-15% on fundraising itself, this is called the ‘burn rate’; and 35-40% on staff and consultants fees. (Kornblut 2009)

The Obama campaign initially spent less than the traditional 50% on TV adverts and radio spots, instead they made sure that the 50 state strategy was ‘fully funded’ and that the campaign would be strong in the field (Grove 2008). Whereas a traditional campaign would fully fund the advertisement side of the campaign and spend any extra money on field operations, the Obama campaign did it in reverse and any excess money was spent on advertising after the field operation had been budgeted for. Obama’s early money was spent building his campaign so it was able to effectively operate in all 50 states (Green 2008).

Spending money on the grassroots strategy was important as the Obama campaign knew it had to expand the electorate to get a high turnout. This approach started in Iowa and was set to continue across the country. There was also a feeling that television would be excessively covering the primary race as it provided the prospect of the first female president or the first African-American president. This meant that the need for wall-to-wall adverts was less necessary than the building of support in the individual states (Grove 2008).

After the small initial cost of setting up MyBo, approximately $2 million (Clayton 2010: 137), the benefits were clear to see. The tool helped organise supporters in the caucus states, and from there they organised the winning delegates with very little money (Tumulty 2008).
There was also a shift to phone banking with no phone banks, where supporters would meet up after work or on the weekend and use their free minutes on their mobiles to call potential supporters from a list of numbers provided, thus saving money (Harfoush 2009: 35). A step further from this was online phone banks rather than physical phone banks, which saved the campaign a great deal of money, and made it possible for supporters to campaign from home – this also provided the campaign with instant feedback on the response of the caller (Stirland 2008b). This is another example of the Obama campaign reducing the barrier for participation.

In addition to the online tools, the money Obama raised allowed him to be competitive in every state, which was crucial to his plan; while Clinton had to write off whole states, which she would end up losing to Obama in landslide figures (Kornacki 2008). The Obama campaign also used the money for more traditional campaigning; he was able to spend $293 million on TV adverts in strategic states to keep himself competitive against both Clinton and McCain between the period of January 1, 2007 to October 19, 2008. By comparison, McCain spent $132 million over the same stretch of time (Stirland 2008b).

**The Long Haul**

Obama’s state infrastructure had been set up months in advance of any caucus or primary by his supporters on their own, without financial support from the campaign in most cases. When Jeremy Bird, the state director for Maryland, turned up in the state after previously campaigning in earlier primaries, he found the whole operation set up – complete with offices, computers, phone lines and regular meetings (McGirt 2009). It was a similar situation around the country. This was the trust and power that the Obama campaign promoted as part of their decentralised campaign. It paid off as Obama ended up winning 61% of the vote in Maryland (CNN 2008).

The Obama campaign organisation was structured such that after a particular state’s primary or caucus had passed the resources from one state could be quickly applied to another state. Supporters could use their time to make phone calls to potential voters, or send emails. In California, a month after their primary that Obama lost by 9 points, supporters were calling John Edwards’ delegates in Iowa to secure votes for Obama. The field offices that had been
set up in California, which were entirely self-sufficient and not funded by Obama’s campaign, were now being used to win delegates in Iowa. As a result of this Obama gained nine delegates from Iowa, two months after the original contest (Green 2008).

*Victory Over Clinton*

Obama’s victory in Iowa proved that he had a credible chance of winning other states too. This win would draw out the primary season, and stop Clinton from winning the nomination on Super Tuesday. To win the nomination the candidate needs the support of 2,118 delegates (CNN 2008). These delegates can come from caucus states, primary states, and superdelegates; with each of the delegates being worth the same. Analysing a state-by-state breakdown of the primary and caucus results shows that the contest was won and lost in the smaller caucus states. The Obama campaign understood their strengths and the rules of the nomination process and used that to their advantage (Lizza 2008).

Superdelegates can vote for any candidate of their choosing and at any time, they also make up just over 20% of the delegates. Before the Iowa contest Clinton already had the support of 154 superdelegates compared to Obama’s 50 (CNN 2008). As the 825 Democrat superdelegates are not a reflection of the actual campaign in the individual states, they have been excluded from the state figures and addressed separately.

*The Primary States*

Clinton targeted and won eight of the ten primary states where there were more than 100 delegates in play, with the exception of North Carolina and Illinois - the state for which Obama was senator (Harfoush 2009: 18). However, due to the proportionate nature of the delegate distribution, Clinton received 830 pledged delegates to the 756 awarded to Obama; a total of 74 more delegates for Clinton (CNN 2008). With all the states taken into account, Obama secured 1,429 compared to Clinton’s 1,463, giving her a small 34 delegate lead (CNN 2008). From Obama’s point of view this was a crucial success, keeping in touch with Clinton in the primaries meant he had a good chance of big victories in the states where Clinton was not effectively competing.
The Democratic Caucuses

Initially the caucus states showed support for Clinton (Grove 2008). But these figures were based on historical data reflecting tendencies of traditional caucus voters. Like in Iowa, the Obama campaign knew they needed to expand the electorate. Obama targeted the caucus states, as the campaign field director, Jon Carson, with the help of Plouffe, realised that the “cost-per-delegate in caucus states was very low” (Lizza 2008). Obama’s 50 state strategy and the disruptive technology of MyBo allowed him to have a presence in every state with supporters organising themselves for the most part (McGirt 2009). Clinton had a paid staff of 700, but they were no match for Obama’s grassroots supporters who, by and large, organised themselves - an operation which would have cost the Obama campaign millions (Clayton 2010: 143). Hillary’s strategy meant that there was virtually no infrastructure operating in these states.

Of the 14 caucus states Obama won 13, with Clinton winning Nevada (CNN 2008). However, winning the popular vote was not enough because in the Democrat Party’s primaries and caucuses the delegates are divided proportionally based on the vote. Obama not only won, but he won most of these caucus states by landslides, eventually coming out of the contests with 324 pledged delegates compared to Clinton’s 170, giving him an extra 154 delegates over Clinton (CNN 2008). This delegate count was more than double the lead Clinton earned targeting the big states. Miller puts the reason for Obama’s caucus success down to the tools he provided to his supporters that helped “thousands of people to organize” (2008). Trippi looked at the cost of these delegate wins in the caucuses and concluded that Obama supporters and volunteers were organising these victories for free (Tumulty 2008) and that Clinton’s “unwillingness to compete all-out in red-states caucuses as a main reason her campaign is in such a predicament.” (Berman 2008).

It is said that caucuses are a test of organisation (Clayton 2010: 141; McGirt 2009), and while Clinton won the Texas primary, Obama, due to his caucus win, left the state with five more delegates than Clinton (Clayton 2010: 141). This win, like many others, can be put down to the organisational strength of MyBo. The Clinton campaign had over 20,000 volunteers in Texas alone, however Obama had 104,000 supporters that were signed up to MyBo in the state (Talbot 2008). It was very easy for the Obama campaign to ‘slice and dice’ their supporters online and send them very localised instructions of how they could help.
Clinton’s downfall was that she did not compete in the caucus states. In the states that she competed in, she generally won. However, her traditionally-run campaign did not have the resources to be competitive across the whole country. Even being able to split the delegates in the caucus states would have likely put her on track to win the Party’s nomination. Her continued failure to campaign in these caucus states cost her. In the words of Plouffe, “every day they didn't, that enabled us really to build up our strength there” (Grove 2008). Plouffe feels that with any campaigning from Clinton, Obama’s landslide wins would have been more evenly split. As it happened Obama was able to ‘rack up’ delegates in the face of no competition. Plouffe put it simply that Obama “might've still won those caucuses, but I guarantee if they had contested them vigorously, our margins would've been shrunk” (Grove 2008). Obama’s landslide wins in the caucuses helped him secure an important delegate lead over Clinton. While Clinton complained of unfairness in the caucus system, Trippi said “If you can win a precinct just by getting ten people there – and that’s true – then why the hell didn’t she get ten people there?” (Dickinson 2008). Clinton did not have the organisation in place to compete with Obama in the caucuses; the full primary and caucus results for each state are provided in Table 1 and have been taken from the CNN 2008 Election Center.

Barack Obama, The Democratic Party’s Nominee

The campaign was so close neither candidate reached the 2,118 delegates majority needed to win the primary outright, so superdelegates were needed to break the tie. Obama led the pledge delegate count by 123 delegates with 1,763 to Clinton’s 1640, even through Clinton had the lead in the popular vote (CNN 2008). On 3 June, Obama had obtained enough superdelegates—ending up with 438 superdelegates to Clinton’s 256—to announce victory over Clinton, four days later she conceded (Jones & Vassallo 2009: 33).

The competitive caucus and primary season made sure Obama was ready and ‘geared up’ to defeat McCain in the general election, who had had a relatively easy nomination process, (Clayton 2010: 156) winning 1,575 delegates compared to the 278 delegates of his nearest challenger, Mike Huckabee (CNN 2008).

By the time Clinton had dropped out of the nomination process, half of the $265 Obama’s campaign had raised had come from donations that were less than $200. Obama was also able
to turn down money from both political action committees and lobbyists (Jones & Vassallo 2009: 35). In the end Clinton had started to ask for smaller amounts, raising around $222 million by the time she dropped out. By the same point in the race, McCain had raised $90.5 million; but he faced less of a challenge for the Republican nomination, so his money was expected to come in for the general election. A third of McCain’s donations were less than $200, with 42% of donors ‘maxing out’ the legal limit of $2300. In comparison only a quarter of Obama donors had ‘maxed out’ (Stirland 2008a).

**Conclusion**

This paper has examined Clayton M. Christensen’s theory of *The Innovator’s Dilemma* when confronted with disruptive innovation and applied it to the 2008 Democratic Party’s nomination. The contest between Hillary Clinton and Barack Obama was very close, the closest in living memory, and the pivotal role disruptive innovation played in deciding the nominee is clear. This paper has argued, using Christensen’s four principles of disruptive innovation,. Obama knew that he could not compete with Clinton with a top-down campaign and his experience as a community organiser led him to try something different. Clinton had too much invested in the old methods of political campaigning to take advantage of disruptive innovation, and also did not see the value in it until it was too late.

If Obama had not used the disruptive technologies in the way he did Clinton would have won. Obama’s use of an online, grassroots, bottom-up campaign allowed him to be competitive in every state, whereas Clinton’s top-down, command-and-control, broadcast TV approach limited her to only being competitive in the traditional battleground states. Obama’s campaign, by contrast, focused on fully funding its field operation, and created a social network to connect and organise supporters. Obama’s belief in grassroots organising, made possible on a mass scale through the internet, also helped fund the campaign with his supporters donating small amounts; this resulted in Obama out-raising and out-organising Clinton. This fundraising operation happened largely by itself, the money was raised online so Obama did not have to spend time fundraising and instead spent more time campaigning, including in the smaller states.
The implications and strengths of Obama’s strategy were shown in the 13 caucus states which were won with generally large margins, Clinton only managed to with the Nevada caucus early on in the race. The delegate lead Obama took from these states more than compensated for Clinton’s lead in delegates from the primary contests.

JFK’s campaign was the first to understand and use the disruptive power of television, especially televised debates, in the 1960 election to overcome Richard Nixon. In a similar way, Obama’s campaign understood and used the disruptive fundraising power and organisational means of the internet to win the Democratic Party’s nomination, and eventually the presidency. While future candidates will be able to learn from Obama’s 2008 campaign, established frontrunners will have to pay particular attention to how they address the next disruptive technologies or face a similar fate as Nixon in 1960 or Clinton in 2008.

Nixon learnt, fought back, and became President in the 1968 election. There is fresh speculation that Clinton will run again for the Democratic Party nomination in 2016. If she embraces the internet from the start, she may be able to win. Almost four years after Hillary Clinton dropped out of the Democratic Party primary, and became Obama’s Secretary of State, there are signs of Clinton finally understanding and embracing the internet.

In April 2012, Clinton personally added a submission to the “Texts from Hillary” internet meme. A meme is a concept that is spread, and sometimes added to, quickly from person to person on the internet, and is often said to have gone ‘viral’. Embracing the meme, that portrayed her in a very favourable light, Clinton invited the creators of the meme to meet her in her office and signed a printout of the meme she submitted: “sup Adam. nice selfie Stace :-( )...ROFL @ ur tumblr! g2g – scrunchie time. Ttyl?...” (Clinton 2012). This was an almost unprecedented move for not only a politician, but even a celebrity If Clinton is able to utilise the disruptive technology that was used against her, and get the right people around her, she might have a chance of the presidency in 2016.

Walter Mondale, after he was defeated by Ronald Reagan in the 1984 presidential election, said, “Modern politics requires mastery of television...I don’t believe it’s possible to run for president without the capacity to communicate every night” (Denton & Woodward 1998: 162). After Barack Obama’s victory in 2008, this paper has shown that it would be unlikely for a candidate to win the presidency without the mastery of the internet, and the grassroots being at the heart of the campaign. Trippi believes that “We’ve seen the last time a top-down
campaign had a chance to win it. There won’t be another campaign that makes the same mistakes the Clintons made of being dependent on big donors and insiders. It’s not going to work again” (Dickinson 2008). Clinton must learn the lessons of 2008 and keep on top of how political campaigns will develop. Clinton needs to be the frontrunner, not only in the polls but also in her adoption of this new and potentially disruptive innovation or she may come unstuck against another paradigm shift in political campaigning.

References


Appendix

Key People

Clayton M. Christensen – The writer of *The Innovator's Dilemma: When New Technologies Cause Great Firms to Fail*. His theory of disruptive innovation is used to explain why Barack Obama was able to win the 2008 Democratic nomination over Hillary Clinton.

Barack Obama – The 44th President of the United States of America and the former Junior United States Senator for Illinois.

Hillary Clinton – Senator for New York and former First Lady of the United States of America. The use herein of ‘Clinton’ refers exclusively to Hillary Clinton. Any mention of her husband and former President will always be referred to as ‘Bill Clinton’. The use of ‘Clintons’ refers to them both.

Barack Obama’s Staff

David Plouffe – Campaign Manager. He has been a long time Democratic consultant.

David Axelrod – Chief Strategist. He was former advisor to President Bill Clinton.

Joe Rospars – Director of New Media. He was formally the Online Director for Howard Dean’s unsuccessful 2004 presidential campaign.

Chris Hughes – Coordinator for Online Organising and creator of Obama’s own social network MyBo. A co-founder of the social network Facebook.

Hillary Clinton’s Staff

Mark Penn – Chief Strategist and Pollster. He was advisor to President Bill Clinton during his time at the White House.
Other People

Joe Trippi – Campaign Manager for Howard Dean’s unsuccessful 2004 presidential campaign. This was the first campaign to use the internet to mix grassroots support and online organising, while also out raising the party frontrunners.

Howard Dean – A 2004 Democratic nominee candidate, who embraced the internet in his campaign. He was the Governor of Vermont and chairman of the Democratic National Committee.

John McCain – The Republican Party presidential nominee for the 2008 United States presidential election. He is a United States Senator for Arizona
Table 1 – The 2008 Democratic Party presidential primary and caucus results of Barack Obama and Hillary Clinton from CNN.


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