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**Social Media in Political Campaigning Around the World: Theoretical and Methodological
Challenges**

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The impact of social media in political campaigning around the world is undeniable. Latest statistics show that close to $\frac{3}{4}$ of US adults use social networking sites such as Facebook and Twitter, with social network use becoming almost ubiquitous among young adults, according to recent data from the Pew Research Center (2018). Globally, an estimated 2.62 billion people use social networks on a daily basis in 2018, with that number projected to reach 2.77 billion by 2019 (Statista, 2018). With their tremendous growth, social media have become an indispensable part of modern political campaigning, both in the United States and internationally. Platforms such as Facebook, Twitter or Reddit have changed how political campaigns are run, how politicians and the public access and share political information, the way we learn about politics, form opinions and attitudes, and ultimately engage in or disengage from the political process.

While social media has clearly affected our understanding of political communication and its effects on the public, it is difficult to see clear monolithic effects. A 2009 meta-analysis showed that Internet use in general had positive, although relatively small, effects on different aspects of political engagement (Boulianne, 2009). Similarly, a 2015 meta-analysis demonstrated only limited effects of digital media use on political participation, showing that only half of 170 reported effects from 36 selected studies were statistically significant (Boulianne, 2015). Yet another meta-analysis found generally positive effects of social media on three different dimensions of engagement, namely social capital, civic engagement, and political participation, when surveying 116 relationships/effects reported in 22 different studies (Skoric et al., 2016).

These comprehensive aggregate studies offer evidence that the effects of social media consumption and use are hardly uniform across different contexts and groups. For example, studies with random samples of youth are more likely to identify a significant effect, compared

to general population samples (Boulianne, 2015). Also, studies that rely on panel data are twice less likely to find positive and statistically significant relationships between social media use and political participation (Boulianne, 2015). Studies have also noted that the relationship between Internet use and political engagement varies depending on type of use. For example, findings by Gil de Zuniga et al. (2013) suggest that only expressive uses of social media predict online as well offline political participation, including voting, while consumptive uses do not. Similarly, Dimitrova and Bystrom (2017) demonstrate that active social media use positively affect caucus participation while passive use has a negative effect. Yet other studies have shown strongest effects when online resources are used for informational purposes (Boulianne, 2009).

Findings such as these suggest that social media effects may depend on multiple factors, including what kind of channels are examined (for example, Twitter versus Instagram versus Snapchat), the specific audience characteristics and predispositions (antecedents such age, political interest, campaign involvement and other psychological factors) and user motivations (e.g., relationship maintenance vs. political engagement vs. self-promotion), what type of social media use is captured (informational, expressive, or relational use) and the political campaign context overall.

Summary of Special Issue

This special issue includes eight manuscripts that span the wide range of questions and methodologies represented in research on social media and political campaigning. They all address the complexities of social media content, use and effects in innovative ways and use data from the U.S., Asia, and Europe. Bosseta's study tracks the use of social media during the 2016 U.S. Presidential primaries and compares cross-platform content on Facebook, Instagram, and Snapchat through observational data. Hale and Grabe zoom into the use of visuals in Clinton and

Trump Subreddits during the 2016 U.S. Campaign and connect that to news values and gender leadership qualities. Extending social media research outside the U.S. context, Bruns examines the role of Twitter in Australian federal elections, comparing its use between the 2013 and 2016 campaigns. Another important aspect of the political conversation on social media revolves around fake news, which Brummette and colleagues show has become highly politicized on Twitter, forming network clusters along party lines.

Moving beyond the content and use of social media, four contributions in this special issue address important theoretical questions about the effects of social media on various outcomes. These pieces clearly demonstrate that social media “effects” are not uniform. From a normative standpoint, they can be alarming and encouraging at the same time. Cacciatore and colleagues focus on how social media affect learning and demonstrate empirically that use of Facebook for news consumption and news sharing purposes is negatively related to political knowledge, pointing to potential detrimental effects in terms of deliberative democracy. Chan examines social media use among voters in Hong Kong and observes contingent effects of political ambivalence and political disagreement on the relationships between partisan strength and social media use. Moving to the Hungarian context, Marton investigates the link between Facebook performance and electoral success during the Hungarian general election, finding empirical support for the two-step flow model: it is not the political candidates but their followers whose sharing of information on social media has an impact on their friends and acquaintances. Finally, Lee et al. examine how politicians’ personal disclosures on social media affect vote intention, suggesting that publicizing politicians’ private information may make them appear less competent under certain conditions. Thus, social media can have positive effects in terms of persuasion and turnout, but also may make politicians appear less competent.

Key Challenges and Directions for Future Research

Based on these multifaceted insights, we outline some key challenges and share some suggestions for future research on social media and political campaigning in the following sections. Despite the progress made, we believe there are three particularly thorny questions that researchers in this area have to grapple with: How to measure the use and content of social media, how to capture the context of social media use and application, and how to advance theory building in our field.

Social Media Use and Content

When looking at audience studies on social media and politics, the lion's share of research uses survey methodology, mostly cross-sectional surveys with self-reported measures of social media. Cross-sectional surveys are useful for many reasons, the rapid pace of data collection being one of them. However, as has often been noted (see Hopmann et al., 2015), cross-sectional surveys raise concerns about spuriousness and reverse causal order (Boulianne, 2015; Skoric et al., 2016). If social media use, for instance, predicts participation controlling for all kinds of variables, we can equally assume the opposite effect: Those who tend to participate are also more likely to turn to social media. No matter the direction of an effect, in such models, an unmeasured third variable can cause spurious relationships, potentially leading to erroneous conclusions.

Although the limitations of such designs are well known and more panel studies have been published in recent years (e.g., Dimitrova et al., 2014; Theocharis & Quintelier, 2016), cross-sectional studies continue to dominate research on social media and political campaigning. Even more importantly, the recent surge of interest in conditional process models has accelerated the use of cross-sectional data, further obscuring the limited usefulness of such designs

(Hopmann et al., 2015). Conditional process models, applied to cross-sectional data, are purely correlational in nature and thus unable to test causal claims.

In addition, cross-sectional studies cannot inform us about the dynamics of social media use and its effects over time. This, however, is a prerequisite to understanding how social media can exert their influence given the dramatic changes in audience structures over the last decades. When exposure to traditional news sources (i.e., newspapers, television news) is in decline and exposure to news on social media is on the rise, we need to be able to test whether social media leads to a real increase in participation and media effects, controlling for a decreasing importance of traditional journalistic news. In a longitudinal perspective, if those cohorts who relied on traditional news sources before now turn to social media, it comes as no surprise that social media has substantial effects on the audience. Thus, the effects we observe may be, to some extent, “old wine in a new bottle.” As individual-level media repertoires change in response to rapid technological developments, influential new channels are likely to emerge at the cost of traditional ones. If this is the case, we would basically observe the same effect, just for a different channel. The question therefore is whether social media facilitate political engagement of those who used to tune out in the world of traditional media, or alternatively, if those who are politically engaged simply add social media to their repertoire at the expense of traditional channels. Of course, there are many arguments against this zero-sum line of reasoning, such as the networked character of social media as well as its expressive nature, both of which may drive the effects we observe in research on social media and political campaigning. Yet it seems safe to say that longitudinal studies with a large time span or multiple-cohort sequential designs are in order to convincingly clarify this conundrum (see Farrington, 1991).

The second thorny issue that future scholarship needs to address involves the ways in which we conceptualize and measure exposure in social media research. Almost the entire body of research relies on self-reports asking respondents to estimate the time or amount of exposure to social media. There are two issues with this strategy. First, making judgments about social media exposure is a demanding task because exposure events are fragmented and scattered across situations, devices, and platforms, posing a critical challenge for the accuracy of self-reports (Araujo et al., 2017; de Vreese & Neijens, 2016, Scharnow, 2016). Social media are often used while performing other media- or non-media related tasks simultaneously, which arguably decreases attention and thus the ability to accurately report exposure to political information (Segijn, Voorveld, Vandeberg, & Smit, 2017). In fact, recent studies using tracking data as a "gold standard" clearly indicate that respondents are not really good at providing accurate estimates of their online use behaviors (Scharnow, 2016). Together with the finding that measures of turnout and political participation are prone to over reporting by respondents (Karp & Brockington, 2005; Persson & Solevid, 2014), at least some caution is in order when correlating social media use measures with participatory responses.

Second, self-report data about exposure remain uninformative about the actual content that respondents were exposed to. As de Vreese et al. (2017) have put it, "While theoretically interesting and innovative, such designs say little about the actual impact of the media content and can thus be dubbed "mere exposure studies", i.e., they show a plausible correlation between media usage and an outcome variable" (p. 222). However, understanding the political content that social media users are exposed to is crucial for theory building in the area. For instance, as Eveland, Morey, and Hutchens (2011) have argued, we need a better understanding of how the notion of "political" is actually understood by survey respondents, especially in a social media

context where the lines between political and non-political information become increasingly blurred. By the same token, asking respondents about their perceived amount of exposure completely ignores the important role of visuals. The growth of image-based social networks like Twitter, Instagram, Pinterest, or Snapchat, has changed the ways in which parties and politicians are leading their campaigns (Page & Duffy, 2017). Visuals are key to our understanding of the persuasive power of social media. Experimental designs may be one solution to this as they provide us with complete control over the content that respondents are exposed to, including visuals. However, most if not all experimental studies on social media and political campaigning have used forced exposure (for instance, Heiss & Matthes, 2016) which is a clear limitation given the abundance of choices in the social media news environment.

Some strategies to alleviate these two problems have been suggested in the literature (Araujo et al., 2017; de Vreese & Neijens, 2016; Moy & Murphy, 2016), such as particular question types for media exposure, the use of anchors, Smartphone and app-based measurements, eye-tracking data, and, most importantly, combining survey data with tracking data or content analytic data. The combination of content analytic and survey data in particular remains a blind spot when charting future research on social media and political campaigning. The challenge is, of course, that social media content is so diverse and multifaceted that it can hardly be sampled with traditional sampling techniques. Yet social media research in the age of “big data” opens up new avenues for social scientists. Using mixed-method research designs in examining the role of social media is highly recommended. For example, researchers should strive to combine computational analyses of social media content with survey data about social media use as well as real-world indicators on political and civic engagement. Companies such as Facebook and Twitter collect troves of granular-level data, such as user engagement, that can be

accessed through their APIs. The beauty -- and the challenge -- of social media is that it presents scholars with large amounts of data. These big data sets require use of new analytical tools such as social networking analysis and topic modeling that, combined with better measures of social media exposure, can open up entirely new avenues for research.

The Context of Social Media

The papers in this issue demonstrate that the uses and effects of social media can only be understood by taking the specific context into account. Countries and regions differ in their party system, their media system, the characteristics of their voters, the content, scope and polarized nature of the political campaigns, the degree of selective exposure based on political preferences and even the structural nature of social media environments (see Van Aelst et al., 2017).

However, the majority of research on social media and political campaigning is based on data from the U.S. which clearly cannot be generalized to other countries and contexts.

Even more importantly, most research is based on single-country studies, and truly comparative research is rare if not almost non-existent (but see Mosca & Quaranta, 2016; Xenos, Vromen, & Loader, 2014). This is troubling because single country studies are bound by the idiosyncrasies of the specific context (see Hopmann, Matthes, & Nir, 2015), and as a result, we lack knowledge about the contextual and cultural factors that drive the content and effects of social media in the political world. Therefore, we need to study social media content, use and effects in a comparative context. A recent meta-analysis reached the same conclusion, stating that future research has to be cross-national (Boulianne, 2015, p. 535). Findings by Boulianne (2017) suggest that the effects of informational uses of social media on participation are smaller in countries with a free and independent press, such as the U.S.. While a large number of important and insightful studies have been conducted in the United States, it is imperative for

future researchers to move beyond US-centric questions and study the phenomenon in a comparative manner, taking into account national context and the local political environment to provide a truly international perspective, ideally applying multi-level models. Existing evidence suggests that, indeed, national context and dominant political system (e.g., established democracies versus other) make a difference (Boulianne, 2015, 2017). Therefore, moving beyond single-country studies is critical to determine the role of social media for political campaigns.

But it is not only the national context that matters. The specific context in which political social media messages and visuals are embedded in a typical newsfeed needs to be taken into account as well (Knoll, Matthes, & Heiss, 2018). Studies frequently overlook the fact that social media are heavily used for entertainment and relational purposes and to a much lesser extent for political information, especially so among the youth (but see Theocharis & Quintelier, 2016). There is a risk in overlooking the non-political uses, which may lead to overestimating the positive influences of social media since inhibiting uses of social media may be neglected. Furthermore, political and non-political uses cannot be fully separated on social media because political content as well as entertainment-oriented content are simultaneously present. A typical newsfeed completely mixes both. Thus, when investigating the effects of political content, its non-political context needs to be taken into account as well. There is a long line of research on context effects suggesting that the surrounding content of a message can have substantial consequences for how the message is perceived and interpreted (e.g., Baumgartner & Wirth, 2012). A theoretical explanation can be found in affective priming (Kühne, Schemer, Matthes & Wirth, 2011). Exposure to entertainment will foster positive emotions or meta-emotions. This, in turn, decreasing the likelihood of negative cognitions in citizens information processing thus

dampening the perceived severity of political issues (Kühne et al., 2011). Hence, when looking at political social media content, exposure, and effects, we argue that the entertainment-oriented context should be taken into account as well.

Theory Building

Last but not least, social media and politics research, just like any good research, needs to be based on strong theoretical models and contribute to theory building. Rather than solely relying on describing the use of social media tools in political campaigning, future research should develop more nuanced models helping our understanding of why and how such tools are being used. Also, when it comes the use and effects of social media at the level of citizens, we need full-fledged theoretical models, especially regarding direct and indirect effects on political and civic engagement. Social media, as a comparatively new phenomenon to our field, should be approached in theoretical terms first, leading to theories, models, and concepts that can then be tested in a second step.

It may be tempting to skip the first step and rush ahead to the second step, leading to an abundance of studies, most of them correlational, on the antecedents and consequences of social media use in a rather short amount of time. We are not calling for a unified theory of all social media uses and effects. Yet we believe that at the moment, our field lacks overarching theoretical frameworks or models, ideally competing ones, which can guide our selection of concepts and help to contextualize our findings. Just to give one example, there are several explanations for why social media use may impact political participation. Some scholars argue that social networks may activate in-group identity, thus fostering participatory behavior (Valenzuela, 2013). Others have suggested the mediating role played by interpersonal communication (Shah, Cho, Eveland, & Kwak, 2005), news exposure (Chan, 2016), network size (Neo, 2015),

expression, or efficacy (Chan, 2016; Knoll et al., 2016) among others. The majority of studies have tested isolated theoretical ideas, mostly boundary conditions and the differences that occur for several alterations of dependent and independent variables. The problem with this approach is that several explanations are suggested and tested without controlling or explicitly testing alternative or parallel ones. Thus, even if several studies support different notions, we cannot simply add them up together to one body of knowledge. This type of research strategy has hampered our ability to fully understand the role that social media plays in political campaigning around the world.

We also call for more research shedding light on the underlying psychological mechanisms of social media effects, necessitating more experimental work and media psychological theory building. As one recent example, the Social Media Political Participation Model (Knoll et al., 2018) attempts to explain the psychological processes and boundary conditions for social media to affect participation. Using a goal psychological approach, it explicates how citizens form, activate, and implement participatory goals before and during a behavioral situation. In a nutshell, the key idea is that citizens engage in several appraisal processes, which mark a chain of contingencies that must be met in order for social media to foster engagement. Depending on their motivational state, citizens must first expose themselves, either intentionally or incidentally, to political information they regard as relevant (*relevance appraisal*). Then, they must conclude that there is a gap between a present state and an undesired/desired future state (*discrepancy appraisal*), and they must regard a future state as attainable (*attainability appraisal*), which in turn leads to a formation of an explicit participatory goal that must be activated against other goals in a real behavioral situation (*dominant goal appraisal*). At each step, a potential impact of social media can be impeded, as for instance,

when people come to believe that there is a discrepancy between a present state and an undesired state, but they feel one can't do anything about it or they simply activate more important alternative goals in a behavioral situation. Even this model, however, is unable to incorporate the full array of theoretical explanations for why social media matter in campaigns. We therefore urge scholars to suggest new theories or theoretical models, understood as a network of intertwined and testable assumptions, rather than isolating the effects of single independent variables on various outcomes.

Conclusion

In closing, we believe that—building on the articles published in this special issue—research on social media and political campaigning needs to address many challenges. We hope that scholars across the world will use this special issue as a springboard for theory building and an inspiration to design theoretically and methodologically demanding studies. There can be no doubt that the future of political campaigning is closely tied to the content, uses, and effects of social media, and therefore, our discipline will be measured on how we tackle these challenges in our future work.

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