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PSYOP AND SOCIAL NETWORKS

by

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This thesis explores how Military Information Support Operations (MISO) organizations can leverage social networks to influence foreign target audiences. The paper acknowledges that some organizations and industries external to the defense community, like non-state actors and large businesses, routinely use social networks to project influence within certain population segments. The thesis uses four case studies to examine how non-state actors and business marketers leverage social networks to persuade target audiences and achieve goals. The case studies generate several inferences about how social networks could be leveraged within the MISO Community. First, the most influential information content does not come from within the MISO team. The best content emanates from a network of many indigenous influential actors close to or within a target audience. Because of this, MISO elements should focus more on becoming "network managers" rather than content developers. Second, to leverage these networks, MISO teams should identify, engage, and build mutually beneficial relationships within the influence network. This is a slow and gradual process based on mutual trust and thus takes years to complete.

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PSYOP AND SOCIAL NETWORKS

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This thesis explores how Military Information Support Operations (MISO) organizations can leverage social networks to influence foreign target audiences. The paper acknowledges that some organizations and industries external to the defense community, like non-state actors and large businesses, routinely use social networks to project influence within certain population segments. The thesis uses four case studies to examine how non-state actors and business marketers leverage social networks to persuade target audiences and achieve goals. The case studies generate several inferences about how social networks could be leveraged within the MISO Community. First, the most influential information content does not come from within the MISO team. The best content emanates from a network of many indigenous influential actors close to or within a target audience. Because of this, MISO elements should focus more on becoming "network managers" rather than content developers. Second, to leverage these networks, MISO teams should identify, engage, and build mutually beneficial relationships within the influence network. This is a slow and gradual process based on mutual trust and thus takes years to complete.

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LIST OF ACRONYMS AND ABBREVIATIONS

AFL-CIO	American Federation of Labor and Congress of Industrial Organizations
API	Application Program Interface
BBDO	Batten, Barton, Durstine & Osborn
DDB	Doyle Dane Bernbach
ICM	independent cascade model
IED	Improvised Explosive Devise
IMF	International Monetary Fund
IPA	Institute of Practitioners in Advertising
MENA	Middle East and North Africa
MISO	Military Information Support Operations
NYABC	New Yorkers Against Budget Cuts
OPE	Operational Preparation of the Environment
PAW	Product Action Worksheet
PWS	Performance Work Statement
S&S	Satchi & Satchi
SMV	Starcom MediaVest
SNA	Social Network Analysis
SOCOM	Special Operations Command
SOW	Statements of Work
TAA	Target Audience Analysis
TBWA	Tragos Bonnange Wiesendanger Airoldi
USAID	United States Agency for International Development
WAAKS	We Are All Khaled Said

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I. INTRODUCTION

A. BACKGROUND AND PROBLEM

Advances in media and communications technology over the past decade have left the world highly interconnected. Information today spreads extraordinarily fast and has the power to shape attitudes and change behavior quickly. For example, the Islamic State of Iraq and Syria (ISIS), at its zenith, controlled as many as 90,000 Twitter accounts that reposted extremist content over 200,000 times per day.[1] ISIS leveraged every type of traditional and non-traditional media platform available to successfully influence audiences on an international level. Its social media tactics were evident preceding its infamous 2014 victory in Mosul, in which it dominated a force forty times larger with far superior weaponry.[2] In the weeks leading up to the battle, ISIS posted propaganda videos, images of military victories, and the brutal executions of Iraqi Security Forces. This exaggerated its military strength, which helped degrade the Iraqi Security Force's willingness to fight. Its messaging contributed to two divisions abandoning their posts as the battle began.[3] ISIS's pre-offensive media campaign was so effective that the Iraqi Communications Ministry blocked all social media sites because they were "undermining Soldier morale."[4]

This brief illustration exemplifies the importance of information and messaging during security operations and underpins the challenges that information stakeholders such as the United States Agency for International Development (USAID), Department of State,

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[1] John Hall, "ISIS Controls up to 90,000 Twitter Accounts, Terror Experts Reveal," Mail Online, March 6, 2015, http://www.dailymail.co.uk/news/article-2982673/ISIS-controls-90-000-Twitter-accounts-uses-spread-sick-propaganda-radicalise-Westerners-terror-experts-reveal.html.

[2] Martin Chulov, Fazel Hawramy, and Spencer Ackerman, "Iraq Army Capitulates to Isis Militants in Four Cities," *Guardian*, June 12, 2014, http://www.theguardian.com/world/2014/jun/11/mosul-isis-gunmen-middle-east-states.

[3] "Militants in Iraq Are Surprisingly Brilliant on Social Media," Business Insider, accessed March 21, 2018, https://www.businessinsider.com.au/isis-propaganda-2014-6.

[4] Rod Nordland, "Iraq's Sunni Militants Take to Social Media to Advance Their Cause and Intimidate," *New York Times*, June 28, 2014, https://www.nytimes.com/2014/06/29/world/middleeast/iraqs-sunni-militants-take-to-social-media-to-advance-their-cause-and-intimidate.html.

and U.S. Special Operations face in the wake of the U.S. adversaries. That is, the United States must face adversaries that have demonstrated unprecedented skill in leveraging information to achieve strategic, operational, and tactical effects. Military Information Support Operations (MISO) is Special Operations Command's (SOCOM) premier branch for executing Information Warfare, influencing foreign audiences, and developing counter extremist narratives. Just like other governmental organizations, MISO has experienced challenges in countering U.S. adversaries. Because of this, it is important to assess new methods that take full advantage of technological advances in communication and ways to improve the efficacy of information campaigns.

At its methodological core, MISO uses social marketing and advertising-centric principals to develop influential content intended to persuade foreign audiences to change their attitudes or behavior.[5] This consists of analyzing a specific target audience by identifying its psychological vulnerabilities, and then developing information content that will induce a change of behavior within the audience.[6] While the MISO community certainly has garnered success using this methodology, it has also experienced significant challenges in disseminating effective messaging that resonates within target audiences. MISO doctrine is partial to creating information content through internal analysis, cultural advisors, and the use of production companies. This internally centric orientation leads to difficulties in developing content that is culturally accurate and disseminated from credible platforms. A RAND study that gauged the effectiveness of MISO operations in Afghanistan from 2001–2012 articulates the issue:

> Failure to take into account cultural, social, political, and religious factors is a major deficiency in PSYOP campaigns. Using focus groups to pretest messages can help correct this deficiency, but the focus groups' membership must closely parallel that of the target audience.[7]

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[5] Curtis Boyd, "The Future of MISO," *Small Wars Journal*, 28, accessed November 30, 2018, http://smallwarsjournal.com/blog/journal/docs-temp/MISO.pdf.

[6] *Military Information Support Operations*, xix–xxi, accessed October 17, 2018, http://www.bits.de/NRANEU/others/jp-doctrine/JP3-13.2C1(11).pdf.

[7] Arturo Munoz, *U.S. Military Information Operations in Afghanistan: Effectiveness of Psychological Operations 2001–2010* (Santa Monica, CA: RAND, 2012), xix, https://www.rand.org/content/dam/rand/pubs/monographs/2012/RAND_MG1060.sum.pdf.

This suggests that there could be other methods that may bridge cultural and operational gaps and enable more organic and flexible information campaigns. Viewing MISO and influence through the lens of social networks, in addition to target audience demographics and psychographics, could potentially assist planning elements in designing more effective programs. This includes the use of indigenous social networks to create and disseminate information.

B. LITERATURE REVIEW

This literature review explores three areas. First, it assesses and describes the most prevalent theories concerning how influence is carried out through social networks. Secondly, it provides a current snapshot of social network studies referencing the defense and security sectors. Lastly, it commentates on the academic gaps concerning influence and social networks as they pertain to defense and security.

Several broad and overlapping theoretical modalities explain how social networks can be used to influence groups of people or individuals within a particular audience. The majority of social network-influence research falls within these modalities. Contagion theory is one such school of thought. Nathan O. Hodas explains that behavior or information spreads like that of a pathogen or virus. The probability that an individual is "infected" with information, behavioral adaptions, or ideas proportionally increases with the number of exposures. The independent cascade model (ICM) is a mathematical framework that represents the theory. The model posits that, all things being equal, an individual requires one exposure to information or a new behavior to be internalized. While the ICM is one of the most widely used and studied influence-centric models, it has been criticized for being unrealistic in representing real-world environments. Complex contagion theory was developed to account for environmental inconsistencies and varying social dynamics. The theory indicates that individuals require multiple exposures of a behavior or information due to variances of emotional state, the feasibility of adopting new behaviors, and the credibility and legitimacy of the originating communicator.[8]

[8] Nathan O. Hodas and Kristina Lerman, "The Simple Rules of Social Contagion," *Scientific Reports* 4, no. 4343 (March 11, 2014), https://doi.org/10.1038/srep04343.

Everett M. Rogers explains that diffusion of innovation theory explores the diffusion rate and breadth of innovative behavior or ideas. The theory indicates that the spread of new behavior is a function of the type of communication channels used, time, social systems, and those who adopt the behavior early.[9] The diffusion of innovation resembles a mathematical "S-curve," which indicates a slow and gradual adoption of new behaviors by innovators. As more individuals observe and adopt a specific behavior, the rate of adoption increases exponentially. As the social network becomes saturated with the new behavior, the rate of adoption tapers.[10]

The "two-step" and "one-step" information theories also explain how information flows and induces behavior change throughout social networks. These two theories specifically orient toward the mass media and influential actors' effect on various target audiences. Kathleen Spencer Stransberry explains that the two-step flow model suggests that mass media information dissemination platforms do not directly influence the general public. Intermediary individuals or organizations more central and closer to public audiences synthesize the information disseminated by the media and then, in turn, influence the public. Conversely, the one step-flow model suggests that general population of a community is directly influenced by information disseminated by mass media.[11] The majority of literature concerning these paradigms tests the two theories under varying environmental conditions. While both theories are backed with qualitative and quantitative evidence, the advent of social media and Internet-based, user generated content has spurred debate about their relevance. Consequently, several experiments have been carried out to test how the theories work when applied to social media. For instance, Martin Hibbert and his colleagues conducted a study that gathered 150,000 Twitter messages concerning social

[9] Everett M. Rogers, *Diffusion of Innovations*, 5th ed. (New York: Simon and Schuster, 2003), 5-6.

[10] Rogers, 23.

[11] Kathleen Spencer Stansberry, "One-Step, Two-Step, or Multi-step Flow: The Role of Influencers in Information Processing and Dissemination in Online, Interest-Based Publics" (PhD diss., University of Oregon, 2012), 15-16.

movements in Chile to illustrate both theories. The study indicates that both paradigms are present in certain conditions.[12]

The concept of "opinion leaders" or "influentials" is central to the two-step theory. P. W. Turnbull et al. explain that "opinion leaders or influentials serve as pacesetters or taste-makers for the group, determining the adoption of each innovation for the group."[13] The concept has been heavily studied. Duncan Watts and Peter Dodds report that there have been over 3,900 studies on influentials and opinion leaders as of 1994.[14] The majority of these focus on the impact that opinion leaders have on groups. There is less information on exactly how opinion leaders influence others.[15] While there is much research that defends the importance of opinion leaders, the theory is contested in certain academic circles. Watts and Dodds state that

> Under most conditions that we consider, we find that large cascades of influence are driven not by influentials but by a critical mass of easily influenced individuals. Although our results do not exclude the possibility that influentials can be important, they suggest that the influentials hypothesis requires more careful specification and testing than it has received.[16]

Theories surrounding social networks are heavily researched, and there are multiple modalities describing how influence diffuses. The defense and security community is interested in how to assess and apply social networks to military and intelligence operations.[17] Based on this literature review the majority of defense-related social network

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[12] Martin Hilbert et al., "One Step, Two Step, Network Step? Complementary Perspectives on Communication Flows in Twittered Citizen Protests," *Social Science Computer Review* 35, no. 4 (August 2017): 444-446, https://doi.org/10.1177/0894439316639561.

[13] P. W. Turnbull and A. Meenaghan, "Diffusion of Innovation and Opinion Leadership," *European Journal of Marketing* 14, no. 1 (January 1980): 4, https://doi.org/10.1108/EUM0000000004893.

[14] Duncan J. Watts and Peter Sheridan Dodds, "Influentials, Networks, and Public Opinion Formation," *Journal of Consumer Research* 34, no. 4 (December 2007): 441–58, http://libproxy.nps.edu/login?url=http://search.ebscohost.com/login.aspx?direct=true&db=bth&AN=27658558&site=ehost-live&scope=site.

[15] Watts and Dodds, 442.

[16] Watts and Dodds, 1.

[17] Naval Postgraduate School, "CORE Lab Social Network Analysis Educational Outreach and Certification Program," accessed November 15, 2018, https://my.nps.edu/web/core/certficate-program.

studies seem to fall into two categories. First, research either explores how to analyze a network or analyzes and deconstructs current threat networks. This type of research provides analysts with the ability gain a better understanding of human terrain or social systems and identifies critical strengths and weaknesses of U.S. adversaries. For instance, Mathew Erlacher, using Indonesian terrorist network data, outlined a proposed analysis method that merges the CARVER analysis system with key components of social network analysis. The CARVER system assesses the criticality, accessibility, recoverability, recuperability, effect, and recognizability of military targets. His methodology prescribed a new way to identify intervention and attack points.[18] Secondly, some research explores how information diffuses over networks. For instance, Jason Brown, using social network analysis software, identifies how social networks could be used as a planning tool for military deceptions. He identified how misinformation affects information diffusion and how it could potentially fragment dark networks.[19]

These topics of study are important contributions to the information operations community. They identify the importance of social networks, how social networks can be analyzed to learn about our operational environment, and that these networks could be used for influence operations. However, there is little defense-centric research available that specifies how special operations can apply information gained via social network analysis to influence individuals or groups of people. What are the best practices in network-centric influence, given the U.S. military's organizational and operational culture? How can the U.S. military evolve from confirming the theoretical importance of social networks to a method of practical application? This gap in knowledge seems to be the final hurdle in implementing network-centric influence operations.

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[18] Matthew D. Erlacher, "Fighting Dark Networks: Using Social Network Analysis to Implement the Special Operations Targeting Process for Direct and Indirect Approaches" (master's thesis, Naval Postgraduate School, 2013), 91.

[19] Jason C. Brown, "Improving Nonlethal Targeting: A Social Network Analysis Method for Military Planners" (master's thesis, Naval Postgraduate School, 2012), v.

C. THESIS QUESTION

How can MISO elements exploit social networks to successfully influence their target audiences?

D. RESEARCH APPROACH

In order to answer the question, this essay will implement a cross-analysis of four case studies. It attempts to identify key characteristics that span multiple cases. The method intends to yield inferences that are instrumental to leveraging social networks to induce behavior change within foreign audiences. This section discusses the overarching research methodology used in the paper, case study selection criteria, analysis criteria, and control functions.

At its most basic form, this study analyzes how other influence-oriented sectors and industries leverage social networks. It then searches for common methods, practices, and strategies. It strays from the beaten path as it analyzes two categories outside of the security and defense community—nonstate actors and business marketing. Upon initial assessment these categories appear quite different from military information operations. However, they both involve the projection of influence to change the behavior of various target audiences.

Business Marketing and Advertising: Businesses try to influence their target audiences to support their brand or buy their products. This often involves the development of comprehensive information campaigns that use a wide spectrum of media and information platforms.[20] MISO uses components of business marketing procedures to sell behaviors and attitudes that support military objectives to foreign audiences. Additionally, Gary F. Keller explains that both the military and businesses are organizations that depend upon strategy to achieve goals.[21] Large businesses also possess a significant amount of

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[20] "Determine Target Audience and Run Marketing Campaigns," *IBM Developer* (blog), June 26, 2018, https://developer.ibm.com/patterns/determine-target-audience-and-run-marketing-campaigns/.

[21] R. Grattan, *Strategy Process: A Military-Business Comparison.* (New York: Palgrave Macmillan, 2014), 253–54.

complexity and bureaucracy.[22] This is a trait comparable to the U.S. military. Because of these similarities, it is worth exploring how large businesses leverage social networks and identifying any new strategies that may be applicable to the MISO regiment. This thesis is not the first piece to compare the business marketing sector to the U.S. military. Todd C. Helmus, Christopher Paul, and Russell W. Glenn's book, *Enlisting Madison Avenue,* explains how the U.S. military should use marketing principles to support combat operations. In particular, the book references practices such as word-of-mouth marketing and the use of "influencers" to help achieve business goals. The book explained the significance of such practices by citing several brief examples of businesses that leveraged these techniques.[23] This thesis falls within the same scope; however, it examines fewer businesses in greater detail and then extracts pertinent insights applicable to the MISO community. Also, Ludovic Stourm explains that since 2008, the marketing industry has changed, in part, due to the availability of big data.[24] Because of this, the industry's social network analysis techniques have most likely evolved. This thesis continues to assess how businesses leverage social networks within the scope of marketing and advertising and looks for areas of application within the MISO community.

Non-state Actors: Non-state actors are "non-sovereign entities that exercise significant economic, political, or social power and influence at a national, and in some cases international, level."[25] Because non-state actors have the ability influence specific audiences to achieve political goals, their techniques may provide key insights, especially pertaining to relationship building. This category is also worth investigating because U.S.

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[22] Daisy E. Chung and Beth Bechky, "When Bureaucracy Is Actually Helpful, According to Research," *Harvard Business Review*, January 3, 2018, https://hbr.org/2018/01/when-bureaucracy-is-actually-helpful-according-to-research.

[23] Todd C. Helmus, Christopher Paul, and Russell W. Glenn, *Enlisting Madison Avenue: The Marketing Approach to Earning Popular Support in Theaters of Operation* (Santa Monica, CA: RAND, 2007), 104–8.

[24] H. E. C. Paris, "Analytics in the Era of Big Data: Opportunities and Challenges," HEC Paris, accessed November 16, 2018, http://www.hec.edu/Knowledge/Point-of-View/Analytics-in-the-Era-of-Big-Data-Opportunities-and-Challenges.

[25] "Nonstate Actors: Impact on International Relations and Implications for the United States" National Intelligence Council, 2007, 2, https://www.dni.gov/files/documents/nonstate_actors_2007.pdf.

forces, specifically MISO elements, may at times work with non-state actors to achieve mutual goals.[26]

In the thesis, four case studies are used. They are based on several common criteria to mitigate extraneous environmental variables that could affect the study's outcome. These criteria seek to model the operational and administrative dynamics of a typical MISO operation.

1. Campaign-centric case study: Case studies will describe a specific information-centric campaign. Within this thesis, a campaign is defined as a series of synchronized events and efforts that support the achievement of a particular end-state or goal.

2. Influence Focused: Each campaign must focus on influencing a specific audience and intend to change behaviors or attitudes.

3. Campaigns must leverage social networks overtly or implicitly.

4. Similar Scope: Campaigns should have a discernable start date. Each must occur with the last decade to account for technological changes in communications technology.

The analysis will examine the following characteristics of each campaign:

1. Basic overview of the campaign, goals, or objectives.

2. How did the organization integrate social networks into its execution?

   (a) Fundamental social network strategy used during the campaign

   (b) Assessment of the network structure as it pertains to the flow of information through digital or physical networks.

3. How did the organization plan and coordinate for the campaign?

[26] This insight is based on the author's experience working MISO and Special Operations community.

From this analysis, the paper will search for traits and patterns that are common to multiple cases and that could be applicable to the MISO community. These traits will then be collated into inferences that may serve MISO operations in the future.

1. Case Studies 1–2: Business Marketing and Social Networks

   (a) Coca-Cola's advertising in support of the 2016 Rio Olympics. In this case Coca-Cola used a multitude of digital influencers to create brand awareness during the 2012 Summer Olympics.[27]

   (b) Pepsi's "Live for Now" Campaign. This campaign attempted to leverage celebrities to create brand awareness. Kendall Jenner was one of the celebrities used which caused the campaign to receive overwhelming negative feedback.[28]

2. Case Studies 3–4: Non-State Actors and Social Networks

   (a) April 6 Youth Movement and We Are All Khalid Said: These two non-state actors were key contributors to the 2011 Egyptian revolution that ultimately ended Hosni Mubarak's tenure as president in 2011. The movement was well known for its ability to leverage social media.[29]

   (b) Occupy Wall Street: In this case the group Adbusters initiated a movement focused on income inequality and wealth distribution within the United States. The popular slogan, "we are the 99%" emerged from this campaign.[30]

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[27] Artemisia Apostolopoulou et al., "#ThatsGold: Sponsorship Activation in the 2016 Rio Summer Olympics," *Journal of Brand Strategy* 6, no. 3 (December 1, 2017): 263–80.

[28] Edward Timke, "Social Media and Advertising," *Advertising & Society Quarterly* 18, no. 2 (July 1, 2017), https://doi.org/10.1353/asr.2017.0019.

[29] Elizabeth Jones, "Seeds of Change: Revisiting Egypt's April 6 Activists," *Al Jazeera,* January 24, 2017, http://www.aljazeera.com/programmes/rewind/2017/01/seeds-change-revisiting-egypt-april-6-activists-170124035054372.html.

[30] "About Us," Occupy Wall Street, accessed March 21, 2018, http://occupywallst.org/about/.

There is significant complexity associated with each case study. Because of this, controlling for counterfactuals is difficult. Upon first assessment, it appears that these types of campaigns should be analyzed in positive and negative pairs. That is, compare predominantly successful cases to predominantly unsuccessful cases. However, upon further research, it appears that each case has both positive and negative aspects due to their complexity and breadth. Furthermore, the outcomes of each campaign are entirely debatable; based on individual perspectives, outcomes can be viewed as positive or negative. Because of this, inferences are made by observing specific challenges and successes within each campaign.

E. BASIC OVERVIEW OF SOCIAL NETWORKS AND SOCIAL NETWORK ANALYSIS

To understand the following cases and analysis it is important to first understand basic principles of social networks and pertinent definitions. A social network is a "network of social interactions and personal relationships."[31] Ultimately these networks are made up of actors and ties.

> The actor set—also referred to as a node or vertex set—in a network can take a variety of forms. Though they often represent individual people, they may also be used to represent groups, organizations, businesses, or even nonhuman entities such as websites, publications, or even improvised explosive devices (IEDs)…. Ties can vary in terms of type, direction, and strength, and they are taken to represent relationships or aggregate relationships. Examples of network ties include those that are affective, or sentiment based (e.g., friendship and liking), role based (e.g., kinship), resource or transaction related (e.g., business transactions and financial flows), derived through affiliation (e.g., participates in the same events, members of the same church, club, and terrorist group), behavioral (e.g., communication), formal (e.g., organizational hierarchy), cognitive (e.g., knows and thinks like), and so on.[32]

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31 *Oxford Dictionary,* s.v. "social network," accessed October 15, 2018, https://en.oxforddictionaries.com/definition/social_network.

32 Daniel Cunningham, Sean Everton, and Philip Murphy, *Understanding Dark Networks: A Strategic Framework for the Use of Social Network Analysis* (Lanham, MD: Rowman & Littlefield, 2016), 10.

These actors and ties are often displayed on a graph called a sociogram. Sociograms allow researchers to visualize important characteristics of the network, such as how people are grouped together, how hierarchical the network is, which actors within the network have importance, or how the network changes over time. Social network analysis (SNA) is thus "a set of theories and methods that were developed to understand social structure."[33]—how various actors relate to one another within certain environmental conditions.

Below are definitions critical to understanding SNA. Refer to these definitions when reading the case studies and analysis.

Arc:

An Arc is directed tie that connects one actor to another actor.[34]

Attribute:

Attributes are nonrelational characteristics of the individual actors in the network. Examples of attributes of individuals include gender, race, ethnicity, years of education, income level, age, and region/country of birth. Examples of organizational attributes include total sales, net income, age of the corporation, and number of employees/members.[35]

Betweenness Centrality:

Betweenness centrality measures the extent to which each actor lies on the shortest path between all other actors in a network."[36] This measurement can be helpful in understanding how various actors connect two groups together.

Bridge:

Formally, a tie is said to be a bridge if deleting it would cause a network to disconnect into different components. Less formally, it refers to a tie that

[33] Cunningham, Everton, and Murphy, 6.

[34] Cunningham, Everton, and Murphy, 323.

[35] Cunningham, Everton, and Murphy, 323.

[36] Cunningham, Everton, and Murphy, 323.

bridges a gap (i.e., structural hole) in a network. Edge betweenness centrality is sometimes used to identify bridges in a network.[37]

Broker:

"An actor that is in a position to broker the flow of material and nonmaterial goods through a network. Analysts have developed numerous algorithms to capture brokerage, including betweenness centrality, structural holes (i.e., the additive inverse of Burt's measure of constraint), cut points, cut sets (i.e., key players), and Gould and Fernandez's brokerage roles.[38]

Centrality:

Centrality measures give a rough indication of the social power of an actor based on their position within the network. A central actor can be someone who has numerous ties to other actors (degree centrality), who is closer (in terms of path distance) to other actors in a network (closeness centrality), who lies on the shortest path (geodesic) between any two actors in a network (betweenness centrality), who has ties to actors who are highly central (eigenvector centrality).[39]

Component:

A component is a subnetwork in which members have ties to one another but do not have ties with members of other subnetworks. In directed networks, you can identify two types of components: strong and weak. Strong components take into consideration the direction of ties, whereas weak components do not. In a strong component each pair of actors is connected by a (directed) path and no other actor can be added without destroying its connectedness. By contrast, in a weak component each pair of actors is connected by an undirected path (i.e., a semi-path) and no other actor can be added without destroying its connectedness.[40]

Directed Network (Graph):

Also known as a diagraph (from directed graph), a directed network is where one or more ties (arc) are directed from one actor to another.[41]

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[37] Cunningham, Everton, and Murphy, 324.

[38] Cunningham, Everton, and Murphy, 324.

[39] Cunningham, Everton, and Murphy, 324.

[40] Cunningham, Everton, and Murphy, 325.

[41] Cunningham, Everton, and Murphy, 326.

Directed Tie:

A directed tie is commonly known as an arc, which is simply a line that points from one actor to another.[42]

Ego Network:

An ego network is an actor's (i.e., ego's) immediate social environment: the set of actors to which the actor has ties (i.e., alters and neighbors) and the ties among those actors.[43]

K-Core:

Formally, a k-core is a maximal group of actors, all of who are connected to some number (k) of other group members.[44] For example a 7-core is a group of actors where each actor has ties to at least seven other actors in the group.

Modularity: A measure of fit used with faction analysis and community detection algorithms to identify the optimal number of subgroups within a network."[45] It is a measure that "compares the ties within and across blocks to what one would expect in a random graph of the same size and having the same number of ties. Formally, it is the fraction of internal ties in each block less than the expected fraction if they were distributed at random but with the same degree sequence. It compares the actual network with a random network of the same size.[46] Modularity helps analysts assess community structure by "describing how the network is compartmentalized into subnetworks (or communities)…Modularity scores indicate how well a "network decomposes into modular communities.[47]

Tie:

A tie is a relation between two actors. A tie can be either directed (arc) or undirected (edge). They can also vary in terms of strength.[48]

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[42] Cunningham, Everton, and Murphy, 326.

[43] Cunningham, Everton, and Murphy, 326.

[44] Cunningham, Everton, and Murphy, 328.

[45] Cunningham, Everton, and Murphy, 329.

[46] Cunningham, Everton, and Murphy, 128.

[47] "Modularity," GitHub, last modified August 23, 2018, https://github.com/gephi/gephi/wiki/Modularity.

[48] Cunningham, Everton, and Murphy, *Understanding Dark Networks*, 331.

Topography: Network topography refers to the overall structure of the network. Commonly used measures include density, fragmentation, network size, and centralization.[49]

[49] Cunningham, Everton, and Murphy, 331.

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II. SOCIAL NETWORKS AND NONSTATE ACTORS

This chapter examines nonstate actors through the lens of social networks. More specifically, it examines how nonstate actors, as part of greater social movements, have been affected by or leveraged relationships to achieve strategic goals. The chapter explores non-state actors by comparing the organizational and interpersonal relationships associated with two movements: The 2011 Egyptian Revolution and the 2011 Occupy Wall Street Movement. These movements were chosen due to their inherent ideological similarities and overlapping time frames. Chapter II will provide a combination of qualitative analysis and network analysis to evaluate each case. The chapter begins by providing a contextual summary of each movement by explaining its origins and major events. Then, it explores how the involved organizations used social networks to achieve their goals. In both cases, this amounts to an examination of how organizational and interpersonal relationships were developed to support the planning and implementation of each movement. The chapter then illustrates portions of each movement's environment through social network analysis. This is accomplished by analyzing social media relationships between activists, bloggers, mainstream media, and the general population. Lastly, the chapter comments on key similarities and differences between the two cases.

A. CASE 1: EGYPTIAN REVOLUTION—THE APRIL 6 MOVEMENT AND "WE ARE ALL KHALID SAID"

1. Background and Context

The Egyptian revolution was part of a broader socio-political reform effort known as the Arab Spring. The movement was rooted in a multitude of systemic political, economic, and social problems that have plagued Egypt and the greater Middle East and Northern Africa (MENA) for years. For instance, Naytei Dhillon states that the Middle Eastern population has developed a significant youth bulge over the past three decades. Two-thirds of the Egyptian population is under thirty years old.[50] At the same time, the

[50] Navtej Dhillon, "Middle East Youth Bulge: Challenge or Opportunity?," Brookings, November 30, 2001, https://www.brookings.edu/on-the-record/middle-east-youth-bulge-challenge-or-opportunity/.

Middle East experienced an overall increase in education and unemployment, which left many college-educated youth jobless. This problem stems from Middle Eastern countries' adoption of economic liberalization programs, which were enforced by international finance institutions like the International Monitory Fund (IMF) and the World Bank. Because of these programs, "basic essential commodities were canceled, government jobs were substantially reduced, and taxation on consumption was increased for citizens while local and foreign investors were granted custom and taxation exemption."[51] By 2011, youth unemployment rates in the Arab world were the highest of any region.[52] This regional dynamic caused significant tension within the MENA population.[53] Ultimately, the latter economic conditions, in conjunction with a large unemployed yet educated youth population, led to an atmosphere fraught with political and social tension.

While this cocktail of geo-political, social, and economic issues brewed for decades, one fateful event catalyzed the Arab spring into action. Rania Abouzeid explains that on December 17, 2010, a man named Mohamed Bouazizi, a local merchant, committed self-immolation in front of the provincial headquarters in Tunisia. His act was a response stemming from repeated humiliation and unfair treatment at the hands of internal security forces. Leading up to the event, a local policewoman confiscated his kiosk goods and humiliated him in the process. Bouazizi attempted to report the incident to the provincial headquarters but was turned away. In response, he set himself on fire as a statement of defiance. News of this event traveled fast and soon the entire country erupted in anger and frustration toward the government.[54]

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[51] Kamal Eldin Osman Salih, "The Roots and Causes of the 2011 Arab Uprisings," *Arab Studies Quarterly, London* 35, no. 2 (Spring 2013): 187, https://search.proquest.com/docview/1355279335/abstract/CD0974B7063C406EPQ/1.

[52] "Youth Unemployment in the Arab World," *Economist*, August 9, 2016, https://www.economist.com/graphic-detail/2016/08/09/youth-unemployment-in-the-arab-world.

[53] "Egypt: The Arithmetic of Revolution," accessed November 30, 2018, https://news.gallup.com/poll/157043/egypt-arithmetic-revolution.aspx.

[54] Rania Abouzeid, "Bouazizi: The Man Who Set Himself and Tunisia on Fire," *TIME*, January 21, 2011, http://content.time.com/time/magazine/article/0,9171,2044723,00.html.

Egypt's revolution contained similar causal characteristics. In fact, many activist organizations within Egypt took inspiration from the Tunisian revolution.[55] In some respects, this transference of motivation can be attributed to social media. Maeve Shearlaw indicates that because of web 2.0 platforms such as Twitter and Facebook, news and information travel quickly and has the ability to impact wide, transnational audiences. As events in Tunisia unfolded and diffused into the social media environment, activist organizations in Egypt ramped up attempts to protest against social and economic injustices.[56] While all this provided the prelude to the revolution, the killing of Khaled Said acted as the catalyst. Ernesto Londono of the *Washington Post* explains that Said was pulled from an Internet café after receiving information that implicated two police officers in illegal drug trafficking. Witnesses state that the police brutally beat him to death. Shortly after his death, pictures of Said's battered body surfaced on the Internet and started to circulate on social media.[57] Within five days of his death, an activist and Google executive named Wael Ghonim created a Facebook page in Said's honor named "We Are All Khaled Said." As anger swept across the Egyptian population concerning the Said's treatment, Ghonim's site swelled with followers, eventually reaching nearly 500,0000 accounts. "We Are All Khaled Said" ultimately acted as a coordinating platform that fed into major demonstrations that took place on January 25, 2011.[58] Over the course of the next seventeen days, youth activists took to the streets and conducted widespread protests. As the Egyptian government attempted to crackdown and contain the revolution, violence ensued, which only kindled the people's frustration. For instance, an Amnesty International

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[55] Mohamed El-Bendary, *Egyptian Revolution: Between Hope and Despair, Mubarak to Morsi* (New York: Algora Publishing, 2013), 6, http://ebookcentral.proquest.com/lib/ebook-nps/detail.action?docID=1363738.

[56] Maeve Shearlaw, "Egypt Five Years on: Was It Ever a 'Social Media Revolution'?," *The Guardian*, January 25, 2016, sec. World news, https://www.theguardian.com/world/2016/jan/25/egypt-5-years-on-was-it-ever-a-social-media-revolution.

[57] Ernesto Londono, "Egyptian Man's Death Became Symbol of Callous State," *Washington Post*, February 9, 2011, http://www.washingtonpost.com/wp-dyn/content/article/2011/02/08/AR2011020806360.html.

[58] Paul Sedra, "Facebook and YouTube Fuel the Egyptian Protests," *New York Times*, February 5, 2011, https://www.nytimes.com/2011/02/06/world/middleeast/06face.html.

report estimated that 800 civilians were killed and another 6,000 were injured during those 17 days.[59] Citizen journalists were also a major part of the revolution. They captured live events and immediately posted photos and video to social media in near real time.[60] In the end, a combination of the military's reluctance to use force against civilians, intense pressure from the protests, political pressure from the United States, and the death of Mubarak's grandson in 2009 led Mubarak to a breaking point. On February 11, Mubarak resigned from office, which ended the revolution.[61]

2. Egyptian Revolution and Relationships

Activist organizations of the Egyptian revolution leveraged social networks to further their cause and achieve political goals. While these organizations most likely did not use formal social network analysis software to assist in decision making, relationships—a fundamental component of social networks, were leveraged to help drive the revolution. This section aims to explore the nature and characteristics of this relationship building. It primarily focuses on the April 6 Movement and the "We Are All Khaled Said" (WAAKS) movements and examines how these two organizations leveraged social connections. The section suggests that that the Egyptian revolution experienced a coalescence of separate activist organizations to support broad political objectives. While the revolution did not have a formal leader that directed actions through a hierarchal chain of command, there was some degree of organizational structure. Specifically, certain activist organizations like the April 6 Movement acted as leaders of the revolution by serving a coordination function, while others coopted into the broader events of the January 25 revolution.

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[59] Lateef Mungin, "Amnesty: Egypt Far from Justice over Unrest That Killed More than 800," CNN, May 19, 2011, http://www.cnn.com/2011/WORLD/africa/05/19/egypt.revolution.report/index.html.

[60] Sahar Khamis and Katherine Vaughn, "Cyberactivism in the Egyptian Revolution: How Civic Engagement and Citizen Journalism Tilted the Balance," Arab Media & Society, May 29, 2011, https://www.arabmediasociety.com/cyberactivism-in-the-egyptian-revolution-how-civic-engagement-and-citizen-journalism-tilted-the-balance/.

[61] "Hosni Mubarak Resigns as President," *Al Jazeera*, February 11, 2011, http://www.aljazeera.com/news/middleeast/2011/02/201121125158705862.html.

The relationship between the April 6 Movement and WAAKs, in many ways, helped drive the revolution. These two groups also helped the movement evolve from seeking political change to pursing a political revolution. Neither organization initially intended to oust the Mubarak Regime. Both had lesser goals and intended to apply social pressure to induce political change within the government. Kara Alaimo explains that the WAAKS page initially intended to address police brutality. The Facebook page indicated that "Said's death was emblematic of the brutality and impunity of Egyptian Security Forces."[62] The page acted as a protest against Security Forces' cruelty and financial corruption. Ghonim aimed to circulate and amplify stories of Egyptian Police brutality to raise awareness concerning the problem.[63] On the other hand, the April 6 Movement was oriented toward developing democratic processes in the Egyptian government. This political ambition primarily stems from economic grievances. The group formed and gained its notoriety by becoming pioneers in the use of social media during protests in 2008. They developed a Facebook page to support a textile workers' strike that protested low wages and high food prices. The site gained significant momentum which amounted to nearly 70,000 members.[64]

Political goals shifted after the January 25 Revolution began building momentum and after activist organizations realized that overthrowing Mubarack was possible. Once hundreds of thousands of activists protested, the movement transcended the goal of political change *within* the Mubarak government. Its primary goal evolved to ousting the entire Mubarak regime, as Yusery Ahmed Ezbawy's article "The Role of the Youth's New Protest Movements in the January 25 Revolution explains:

> The demands of the youth organizers also took on a snowball effect. They started with specific grievances against the heavy security shackles on society and the opposition to inheritance of the presidency by Gamal

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62 Kara Alaimo, "How the Facebook Arabic Page 'We Are All Khaled Said' Helped Promote the Egyptian Revolution," *Social Media + Society* 1, no. 2 (September 22, 2015): 4, https://doi.org/10.1177/2056305115604854.

63 Alaimo, 4–5.

64 "Revolution in Cairo—April 6 Youth Movement," PBS, accessed June 12, 2018, http://www.pbs.org/wgbh/pages/frontline/revolution-in-cairo/inside-april6-movement/.

> Mubarak, and then the ceiling was raised to urge comprehensive political reform which then grew into one major demand: the ousting of Mubarak.[65]

After Ghonim's WAAKS Facebook page began to build significant momentum, he realized that it could be used to leverage political goals. However, due to the spontaneity of the events surrounding Said's death and the subsequent backlash, Ghonim did not possess a real plan for leveraging the page to implement physical demonstrations.[66] Furthermore, Ghonim was located in UAE during the lead up to the January 25 protests, and he did not possess much activist experience.[67] Because of this, he decided to begin relationship building with activist organizations operating on the ground in Egypt. Initially, Ghonim reached out to one of the April 6 Movement's founders—Ahmed Maher and the El Baradei Campaign's leading activist, Mostafa Al Nagar.[68] During their conversations, the three discussed the potential for conducting demonstrations on January 25. Below is an excerpt from a conversation between Maher and Ghonim:

> Ghonim: Bravo on the work you have done lately.
>
> Maher: Thanks.
>
> Ghonim: By the way, we need to collaborate on a crazy idea.
>
> Maher: Oh really? Crazy people are the ones that create change.
>
> Ghonim: January 25th is "Police Day." We want to celebrate it.
>
> Maher: Cool.
>
> Ghonim: [Showcasing] positive examples and negative examples of police behavior.
>
> Maher: We celebrated it last year.

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65 Yusery Ahmed Ezbawy, "The Role of the Youth's New Protest Movements in the January 25th Revolution," *IDS Bulletin* 43, no. 1 (January 2012): 26, https://doi.org/10.1111/j.1759-5436.2012.00287.x.

66 Wael Ghonim, "Inside the Egyptian Revolution," transcript, TED, accessed June 15, 2018, https://www.ted.com/talks/wael_ghonim_inside_the_egyptian_revolution/transcript.

67 Wael Ghonim, *Revolution 2.0: The Power of the People Is Greater Than the People in Power: A Memoir* (Boston: Houghton Mifflin Harcourt, 2012), 160.

68 Ghonim, 159.

Ghonim: Really? Send me any links so I can see what you did.[69]

The two eventually formed an alliance built on mutual goals. Ahmed Maher, with the April 6 Movement, would act primarily as a behind-the-scenes facilitator and coordinator while WAAKS would be the face of the operation. This is seen in Figure 1, two excerpts collected by the *New York Times*. Ghonim used the screen name Khaled Said within the correspondence.

FROM:Ahmed Maher
TO:Khaled Said
SUBJECT:re: Very Important Regarding April 6 and the Silent Stand

...This leads us to an important point: maybe we can have a declaration between us, agreeing to consult, collaborate, and coordinate together, so that young people will not be so scattered and afraid anymore during these protests... So what do you think about setting some ground rules for collaboration, while keeping April 6 Youth behind the scenes?

FROM:Khaled Said
TO:Ahmed Maher
SUBJECT:re: Very Important Regarding April 6 and the Silent Stand

I can't begin to describe how happy I was when I read your e-mail...

Young people are afraid of anything political; you have probably noticed how [on the Facebook page] I am gradually moving them away from this fear [of politics] and subtly inserting some political subjects...

Figure 1. Email between Maher and Ghonim[70]

Ghonim eventually posted a call to protest on January 25 on the Facebook page. Concurrently, the April 6 Movement attempted to coordinate the event between other activist organizations that had similar goals. In fact, this coordination was occurring on

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69 Ghenwa Hayek, "The Digital Road to Egypt's Revolution," *New York Times*, February 12, 2012, http://archive.nytimes.com/www.nytimes.com/interactive/2012/02/12/opinion/sunday/20120212-tahir-timeline.html?_r=0.

70 Source: Hayek.

multiple fronts by various organizations.[71] However, from analysis, it appears that the April 6 Movement and the Al Baradaei campaign were the heavy lifters for facilitating collaboration.[72] Ultimately, the initial link that developed between Ghonim and the April 6 Movement helped draw WAAKS further into the network of activists in Egypt. Throughout the revolution it is evident that the April 6 Movement acted as a critical broker within the activist network in Egypt.

3. How the April 6 Movement Used Social Networks to Achieve Goals

The April 6 Movement acted as an organizational synchronizer that helped integrate the WAAKS Facebook page into the activist network within Egypt. It was also a driving force behind the relationship building and collaboration necessary for implementing large-scale demonstrations on January 25. Yusery Ezbawy indicates that the April 6 Movement was uniquely equipped to act as a synchronizer due to the notoriety it cultivated after protests in 2008, its decentralized operating structure, and its breadth and size. The organization also possessed wide reach as there were April 6 branches in 24 governorates in Egypt. Because of these characteristics, the April 6 Movement was able to coordinate events at a very high level.[73] For instance, April 6 leadership coordinated with another large activist group—the National El Baradei Campaign's Youth.[74] Together they developed the basic plans for the January 25 protests. In particular, they identified meeting points and demonstration locations. The Muslim Brotherhood Youth also took part in some of the coordination but was reluctant to formally endorse the protests.[75]

As these dominant activist groups put out the call to protest, other smaller or less involved groups mobilized and participated in future planning. For instance, Salma Shukralla explains that after the first protest on January 25, the April 6 Movement assisted

[71] Ghonim, *Revolution 2.0*, 164–66.

[72] In Wael Ghonim's memoirs, leaders within the April 6 Movement and El Baradei campaign were primary points of contact and provided the majority of the facilitation in support of the 25 January event.

[73] Ezbawy, "Role of the Youth's New Protest Movements," 29.

[74] Ezbawy, 29.

[75] Ezbawy, 30.

in developing the Revolutionary Youth Coalition, which allowed the movement to evolve from informal connections and cooperation to a more standardized structure that could operate under common goals and objectives. The coalition was led by the largest youth organizations in the country, including the April 6 Movement, Justice and Freedom, Muslim Brotherhood Youth, El Baradei's Campaign, The Popular Democratic Movement for Change, the Democratic Front, and WAAKS.[76] Additionally, smaller organizations took part in a broader assembly within the coalition.[77] The Revolutionary Youth Coalition assisted the movement in coordinating events and defining objectives. "It served as a key intermediary between the people and the regime and acted as the official representative of the revolutionary youth to the media"[78] Ultimately, the coalition helped the group broker relationships and deal with the Egyptian government in a more unified manner. According to Issandr Al Amrani, the coalition's final report states that the RYC met with key figures and organizations within the Egyptian government. This included the Supreme Council of the Armed Forces and the General Intelligence Services to discuss elections and the formation of a new government.[79]

From assessing the revolution's organizational structure, one might think that the relationships between activist groups formed organically and quickly. However, the relationship structures that ultimately became the Revolutionary Youth Coalition were forged over nearly a decade. For instance, the April 6 Movement had preexisting relationships with other groups before the death of Kahled Said. Activist groups showed a pattern of working together if goals aligned. For example, the April 6 Movement was born out of several older activist and political groups, and this allowed movement members to

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[76] Salma Shukrallah, "Egypt Revolution Youth Form National Coalition," Ahram Online, February 9, 2011, http://english.ahram.org.eg/NewsContent/1/64/5257/Egypt/Politics-/Egypt-revolution-youth-form-national-coalition.aspx.

[77] Sarah Anne Rennick, "The Practice of Politics and Revolution: Egypt's Revolutionary Youth Social Movement" (PhD diss., Lund University, 2015), 344.

[78] Rennick, 197.

[79] Issandr El Amrani, "In Translation: The Revolutionary Youth Coalition's Final Report," *The Arabist* (blog), July 18, 2012, https://arabist.net/blog/2012/7/18/in-translation-the-revolutionary-youth-coalitions-final-repo.html.

build and keep relationships. Ahmed Tohmy's book, *Youth Activism in Egypt, Islamism, Political Protest and Revolution* explains this phenomenon:

> a number of political parties played roles as incubators for the young activists of April 6—al Ghad, and later the Democratic Front Party, became a vehicle or network from which young activist benefited. Adel for example emphasized that "plenty of activists of April 6 were members of the DFP which opened its doors and headquarters to support the new activism. Indeed, this produced a kind of overlapping entanglement between the youth and social movements in Egypt.[80]

The above passage indicates that interorganizational collaboration was normalized into activist culture in Egypt. This pre-existing trust helped the groups to coalesce into the major coalition that ultimately led to a successful revolution.

4. The Egyptian Revolution's Network and the Broader Media Community

The organizational networks that key groups like the April 6 Movement and WAAKS developed are certainly not the only factors that led to Mubarak's ouster. The broader media environment, which included bloggers, citizen journalists, activists' social media posts, and mainstream media greatly contributed to the revolutions trajectory as well. Nadia Idle and Alex Nunns explain that the Egyptian revolution has often been nicknamed the "Twitter Revolution" due to social media and the Internet's integral role in spreading information and coordinating protest events.[81] This section first describes the impact that traditional and social media had on the revolution. It then then uses social network analysis to illustrate several media phenomena that occurred during the revolution. In particular, the analysis will shed light on how activist organizations fit into the broader regional and international information network. To accomplish this, the section analyzes Egypt-centric Twitter messages and examines the social media network in and around Egypt during the revolution. The analysis indicates that mainstream media played a central

[80] Ahmed Tohamy, *Youth Activism in Egypt: Islamism, Political Protest and Revolution* (London: I.B. Tauris, 2016), 186–87.

[81] Nadia Idle and Alex Nunns, "Tahrir Square Tweet by Tweet," *Guardian*, April 14, 2011, http://www.theguardian.com/world/2011/apr/14/tahrir-square-tweet-egyptian-uprising.

role in information diffusion. Specifically, mainstream news affiliates helped broker the revolution's message to the international community.

Social media had a profound effect on certain aspects of the Egyptian Revolution. In particular, the platforms like Twitter and Facebook allowed activists to coordinate events and spread information. For instance, Julie B. Weist states that the April 6 and WAAKS Facebook pages served as an excellent tool for mobilizing events very quickly. The pages connected thousands of individuals to the main source of information.[82] Second, social media, by way of smart phones, empowered an entire wave of "citizen journalists" who reported on protest events and posted inspirational photos and video. These videos were accessible to a broad audience including mainstream media journalists[83] Furthermore, prominent bloggers used their online audience to build awareness and understanding concerning the movement and its goals. Bloggers provided a "consistent narrative often used to counter that provided by the authoritative power, the Egyptian government."[84]

Traditional media outlets also played a significant role in the revolution. Mainstream media like CNN and NBC helped connect events to the rest of the world. Alexa Robertson explains this type of amplification:

> Social media such as Twitter played a key role not in bringing ordinary Tunisians and Egyptians to the streets, but in connecting the rest of the world to the protests in real time. A key connection here is that between cyberactivists (and ordinary people sharing testimony of the protests and their crackdown via mobile phone) and journalists working for mainstream media, and particularly global news channels.[85]

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[82] Julie B. Wiest, "Social Media in the Egyptian Revolution: Reconsidering Resource Mobilization Theory," *International Journal of Communication* 5 (2011): 1218.

[83] "Citizen Journalism Paves the Way in Egypt," Pulitzer Center, November 16, 2011, https://pulitzercenter.org/reporting/citizen-journalism-paves-way-egypt.

[84] Ban Al-Ani et al., "The Egyptian Blogosphere: A Counter-Narrative of the Revolution," *Proceedings of the ACM 2012 Conference on Computer Supported Cooperative Work* (2012): 24, https://doi.org/10.1145/2145204.2145213.

[85] Alexa Robertson, "What's Going on? Making Sense of the Role of the Media in the Arab Uprisings," *Sociology Compass* 9, no. 7 (July 2015): 538, https://doi.org/10.1111/soc4.12278.

5. Social Network Analysis of Media Networks during the Egyptian Revolution

Robertson describes a relationship between ground level actors, major news affiliates, and the international community. She indicates that the immediate social networks surrounded by activist organizations like April 6 and WAAKS were not enough to propagate revolutionary messaging to the international community. On an organizational level, activist groups needed to tap into mainstream media networks to propagate their messaging. The analysis that follows illustrates the connections between local events and activists, mainstream news organizations, and the international community. It does this by analyzing Twitter message data from January 28 and February 4, which are later compared with the Occupy Wall Street movement.

a. About the Data

The data were collected from the Twitter Application Program Interface (API) by Dr. Sean Everton and Rob Schroeder from the Naval Postgraduate School. Twitter messages that contained #Egypt were scraped from the API. The dataset does not represent 100% of all Tweets tagged with #Egypt. Rather, Twitter provides samples based on search queries, which most likely have access to less than 10% of Twitter's total data. Furthermore, Twitter's data distribution processes through the API is unknown. It should also be noted that the data was retrieved during a period where the Egyptian government imposed Internet blackouts in attempts to curtail the revolution. This means that the level of Twitter traffic originating from Egypt is lower than one may expect. Despite this, the data appears to be adequate for identifying major trends in communications networks.

b. Data Boundaries Used for the Egyptian Revolution

Identifying a social network's boundaries can sometimes be difficult. The following parameters further describe the Twitter sample boundaries. Relational and attributional ties within this network are represented digitally on Twitter. Each data entry must reflect the Egyptian Revolution. Initially, the data set was massive, consisting of over one million nodes. The dataset captures mentions or replies and retweets that contain the hashtag "Egypt." Visually, tweets are network vertices. Retweets, replies, and mentions are network ties. To examine the local Twitter network, nodes that included the hashtag #25Jan or #Jan25 were extracted. This hashtag was a primary label for the Egyptian revolution and was used locally. To further refine the network, another extraction was completed based on node attribute data. Nodes were extracted whose Twitter feeds displayed Egypt's time zone. Filtering by time zone is preferred due to potential inaccuracies in users' displayed location. Geolocation coordinates were also not available in much of the data. These extractions were necessary to effectively compare the Egyptian Revolution and Occupy Wall Street networks.

c. *Network Analysis*

Figure 2 is a visual representation of the entire Twitter network. Data was uploaded into Gephi for analysis. Gephi's modularity algorithm identified seven subgroups, which are identified by the various colors in the following sociogram. The size of each node reflects betweenness centrality.

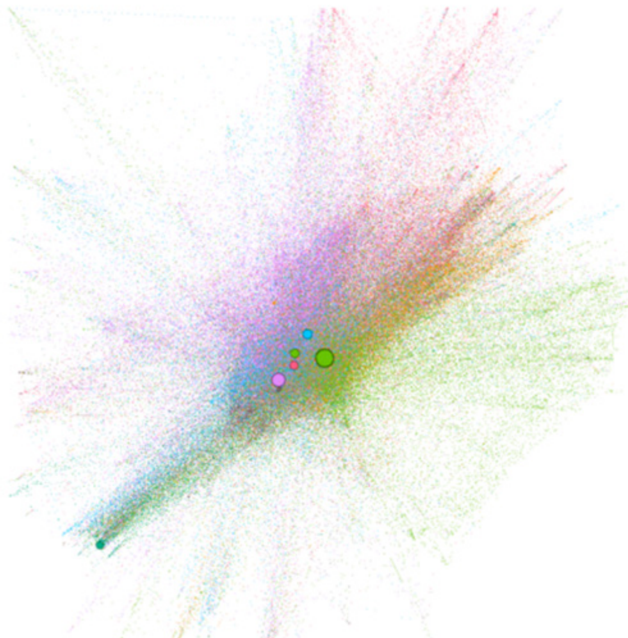


Figure 2. Egyptian Revolution Twitter Network[86]

To investigate the information flow within the network further, the three largest subgroups were extracted (see Figure 3). From this, it is easy to see that there is little overlap between the purple and green shaded groups. To further explain shared characteristics within each group, the top 15 nodes were identified by betweenness and in-degree centrality as shown in Figure 4. Several observations can be made. First, the groups seem to have a geographical orientation and their nodes tend to share similar traits. For instance, the majority of actors within the green group are local news, activists, and bloggers. The preponderance of the blue group is comprised of journalists employed or affiliated with mainstream news outlets, and many of the purple group nodes within the table are the primary Twitter accounts of mainstream media organizations such as CNN.

[86] Adapted from Sean Everton and Rob Shroeder, "Egyptian Revolution Twitter Data-Set," Monterey, CA: Naval Postgraduate School, 2011.

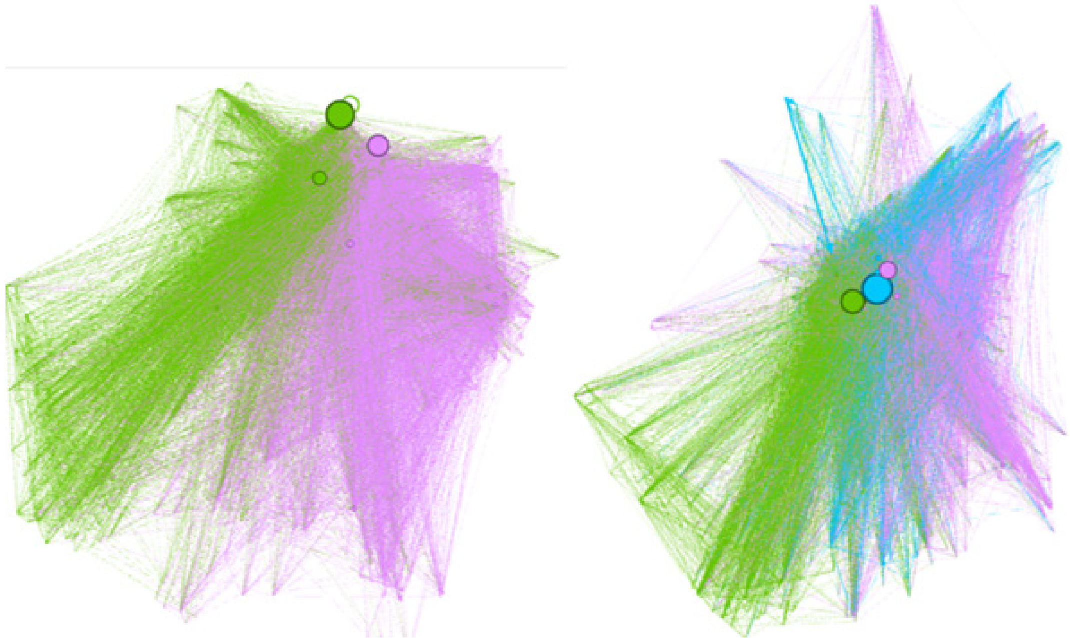


Figure 3. Three Largest Subgroups in the Network[87]

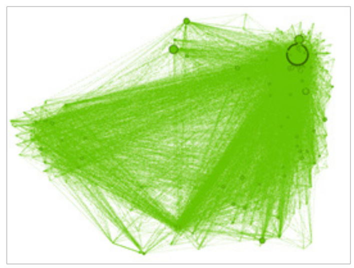
When assessing this data and the sociographs, it appears that in-the-field journalists who are affiliated with mainstream news outlets may be acting as brokers of information. This supports Alexa Robertson's observation that Twitter connects bloggers and the rest of the world. To test this assumption, betweenness centrality was measured for the top 15 actors in each group while they were part of the whole network. Betweenness centrality was measured again after each group was extracted and isolated. Groups were extracted to identify which nodes act as brokers internal to their own groups and which nodes act as information brokers between groups. Those nodes that experienced a drastic reduction in betweenness centrality after the groups were extracted are likely to be information brokers to external groups.

[87] Adapted from Everton and Shroeder.

	Ind	outd	betcntr	Description
Component Containing more Mainstream News Accounts				
sharifkouddous	778.00	1780.00	315849.73	indp jounralist
nickkristof	266.00	1026.00	104882.42	AffiliateNew York Times
camanpour	354.00	499.00	75021.43	AffiliateCNN
breakingnews	150.00	997.00	67564.23	Mainstream news
washingtonpost	153.00	936.00	61734.26	Mainstream news
andersoncooper	365.00	338.00	54842.60	AffiliateCNN
huffingtonpost	173.00	741.00	54668.53	Mainstream news
statedept	208.00	403.00	44455.24	US Government
cnnbrk	132.00	769.00	43956.47	Mainstream News
jeremyscahill	106.00	715.00	40604.00	Journalist
cnn	464.00	165.00	40482.75	Mainstream news
richardengelnbc	132.00	426.00	32831.92	AffiliateNBC
pjcrowley	190.00	398.00	31664.16	Government Official
nytimes	219.00	300.00	26205.09	Mainstream news
Component Containing More News Affiliates				
Id	indegree	outdegree	betweenesscentrality	
ajenglish	144.00	222.00	57116.73	Mainstream news
ajelive	53.00	165.00	19110.35	Mainstream news
nolanjazeera	61.00	168.00	17987.25	Affiliate- AL Jazeera
aymanm	63.00	135.00	13937.59	Affiliate- AL Jazeera
asteris	38.00	47.00	6905.86	free-lance journalist
alanfisher	15.00	93.00	3697.64	Affiliate- Al Jazeera
soniaverma	25.00	58.00	3657.39	Affiliate- AL Jazeera
stahlblu	30.00	11.00	3101.13	unknown
fieldproducer	17.00	44.00	3040.82	affiliate
dany_k	25.00	25.00	2908.86	unknown
reuters	20.00	61.00	2789.11	Mainstream news
katalystprods	20.00	29.00	2683.95	AffiliateBBC
hamish6pm	19.00	75.00	2641.68	unknown
ianpj	24.00	20.00	2031.64	Tech Service/Political Activist
Component containing Middle East Focused/Local bloggers, activists, News				
dima_khatib	230.00	935.00	59735.36	AffiliateAl Jazeera
ramyraoof	214.00	514.00	33842.08	Activist
arabrevolution	159.00	565.00	30460.19	Activist
weddady	173.00	334.00	28513.39	Activist
alaa	349.00	214.00	24683.08	Activist/blogger
abdu	113.00	427.00	24427.56	AffiliateAl Jazeera
ajarabic	190.00	228.00	21323.49	Mainstream Media
hosnimobarak	53.00	528.00	18500.20	activist
octavianasr	77.00	430.00	17508.24	Journalist
noornet	102.00	273.00	14546.31	activist
justimage	95.00	357.00	14021.84	AffiliateAl Jazeera
nadiae	108.00	341.00	13346.90	Egyptian Journalist
sandmonkey	461.00	47.00	12643.94	Activist
litfreak	108.00	359.00	12522.69	Activist
jonjensen	47.00	332.00	11995.86	AffiliateCNN
essamz	67.00	125.00	10215.48	economics writer
inwpress	62.00	30.00	10113.33	unknown

Top Nodes – More Western News Hubs

Top Nodes Containing More Mainstream News Affiliates



Top nodes – Containing More Activists and Local News Stations

Figure 4. Top Centrality Scores with Each Subgroup[88]

Calculations indicate that the blue group experienced a significant reduction in betweenness centrality. On average, nodes from the blue group experienced 1,073% decrease in betweenness centrality, while the green group only saw a 40% decrease. Interestingly, the purple group experienced a 4% increase in betweenness centrality. Taken together, these results indicate that the top nodes within the blue group were the most externally focused of the three groups. This characteristic is reasonable evidence that

[88] Adapted from Everton and Shroeder.

mainstream media served as an information broker between the Middle East and Western communities.

To further analyze the Egyptian revolution's Twitter network, all tweets that included #25January and whose accounts aligned with Egypt's time zone were extracted from the whole network. Figure 5 is the visualization of this network.

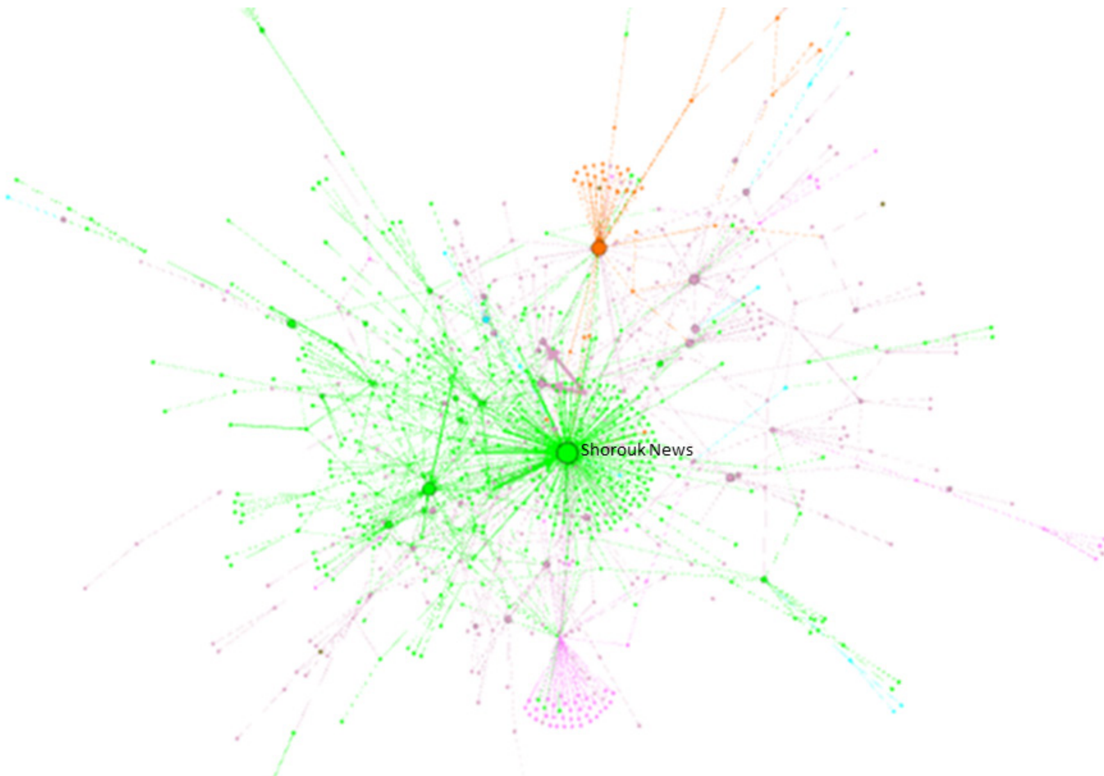


Figure 5. Egyptian Revolution Tweets: #25January[89]

Gephi identified four subgroups, which are highlighted by color. Node size reflects in-degree centrality. Table 1 presents the top 15 nodes ranked by in-degree centrality. It is interesting that Shorouk is the most central to the network but possess a low betweenness centrality score. This type of reading may indicate that there are redundancies in Shorouk

89 Adapted from Everton and Shroeder.

News's ego network based on Nodus Lab's explanation of this dynamic.[90] More specifically, those who are retweeting or mentioning Al Sharouk's Twitter posts are from the same group and are not connected to other groups. Al Sharouk's betweenness centrality may indicate that while it is a popular local news channel, it does little to propagate the information to the international community or other groups.

Table 1. Egyptian Revolution Nodes Ranked by In-degree Centrality[91]

Id	betweenesscentrality	indegree	outdegree	Degree
shorouk_news	0.00	562.00	0.00	562.00
mohamedahmos	0.00	395.00	0.00	395.00
almasryalyoum_e	0.00	346.00	0.00	346.00
rassdwehda	1012.79	177.00	2.00	179.00
jonjensen	152928.49	154.00	2.00	156.00
ramyraoof	0.00	146.00	0.00	146.00
waelabbas	0.00	145.00	0.00	145.00
bencnn	0.00	139.00	0.00	139.00
moneimpress	0.00	127.00	0.00	127.00
daliaziada	115226.88	105.00	6.00	111.00
almasryalyoum_a	0.00	87.00	0.00	87.00
monasosh	0.00	84.00	0.00	84.00
deena_adel	76457.75	81.00	3.00	84.00
sandmonkey	0.00	81.00	0.00	81.00
abdulhaykal	60007.19	65.00	1.00	66.00
egyptocracy	0.00	65.00	0.00	65.00
noornet	141030.78	62.00	13.00	75.00
alaa	209002.03	59.00	3.00	62.00
shefaa	76333.65	59.00	7.00	66.00
3arabawy	0.00	57.00	0.00	57.00
ghonim	0.00	57.00	0.00	57.00

90 "Network Visualization and Analysis with Gephi," Nodus Labs, accessed June 13, 2018, https://noduslabs.com/courses/network-visualization-and-analysis-with-gephi/units/section-1-quick-introduction-to-network-analysis/page/10/?try.

91 Adapted from Everton and Shroeder.

B. CASE 2: OCCUPY WALL STREET

In some ways Occupy Wall Street is an Americanized, less successful version of the Arab Spring and the Egyptian Revolution. Nathan Schneider explains that some Americans watched how hundreds of thousands of Egyptians banded together to achieve real political objectives. The Egyptian revolution, in many ways, showed the political potential of protest and activism.[92] First, this section provides a basic overview of the movement. It then explores the Occupy Wall Street Movement through the lens of social networks. Specifically, it attempts to identify how the movement leveraged social networks to mobilize supporters. In addition to this, it discusses the inherent limitations that the OWS movement experienced and how this affected its goals and objectives. This section finds that like the Egyptian revolution, OWS experienced a significant coalescence of small and oftentimes unsuccessful activist groups. This coalescence built a shared consciousness that accounted for some ideological diversity within the group. However, as these groups united they built a horizontal and leaderless command structure which made leveraging their social networks and establishing goals difficult. Social network analysis indicates that the movement spread across the country. It also indicates that mainstream media was not central to the movement's network.

1. Background and Context

The Occupy Wall Street Movement initially stemmed from a combination of economic issues that manifested in the in 2000s. One major contributing force behind the OWS movement was the 2008 financial crisis. Jim Randel explains that as the demand for housing increased throughout the 1990s and 2000s, lenders relaxed their approval standards, often providing risky loans to individuals with poor credit. These loans were sold to investment bankers who combined them into collateralized debt securities, which were eventually sold to the investment community. These transactions were possible because investors did not anticipate that the housing market would crash. When it started

[92] Nathan Schneider, *Thank You, Anarchy: Notes from the Occupy Apocalypse* (Berkeley: University of California Press, 2013), 176, http://ebookcentral.proquest.com/lib/ebook-nps/detail.action?docID=1251017.

to decline in 2006, homeowners, who could not afford their monthly payments, found it difficult to refinance their mortgages. As people started to default on their home payments, mortgage securities dropped in value.[93] The bad investments ultimately caused financial institutions to resist lending, which ultimately froze U.S. credit system.[94] This led to an economic recession and the systematic shutdown of many major financial institutions and as well as the auto industry. The U.S. government ended up bailing out many of these companies such as AIG and General Motors using taxpayer dollars.[95] While bailouts were arguably very necessary to prevent the world's financial system from collapsing, the general perception was that corruption and corporate greed—the richest "1%," were being rewarded for its irresponsible actions at the expense of the average taxpayer—the other 99%.[96] This, in conjunction with years of economic downturn after 2008, provided the necessary social tension for the occupy movement to manifest.

Occupy Wall Street officially began on 17 September 2011 in response to a call for action disseminated by Adbusters, a nonprofit social activist organization whose goal is revising the current power structure and establishing a political system that is more equitable and safe. In the past, Adbusters focused heavily on combating commercial broadcasting, but as the organization developed, it took on a more diverse set of social issues.[97] The call to action took the form of a digital poster depicting a young lady balancing on the "Wall Street Bull" located in the financial district (see Figure 6). The text

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[93] Jim Randel, "Understanding the Economic Crisis in 800 Words," *Huffington Post*, May 31, 2010, https://www.huffingtonpost.com/james-randel/understanding-the-economi_b_520283.html.

[94] "Occupy Wall Street: Making Sense of Occupy Wall Street," *Chicago Tribune*, October 9, 2011, http://articles.chicagotribune.com/2011-10-09/opinion/ct-edit-occupy-20111009_1_protests-occupational-therapy-financial-crisis.

[95] *Chicago Tribune*.

[96] "Occupy Wall Street, Tea Party Movements Both Born of Bank Bailouts," FOX Business, March 26, 2015, https://www.foxbusiness.com/markets/occupy-wall-street-tea-party-movements-both-born-of-bank-bailouts.

[97] Jeff Sommer, "Adbusters' War Against Too Much of Everything," *New York Times*, December 22, 2012, https://www.nytimes.com/2012/12/23/business/adbusters-war-against-too-much-of-everything.html.

on top of the poster reads, "What Is Our One Demand?" On the bottom, the hashtag #OccupyWallstreet, "September 17th," and "Bring Tent" are posted.[98]

Figure 6. Occupy Wall Street Digital Poster[99]

This message began circulating the Internet, and several activist organizations that were planning economically focused protests decided to coopt the event and helped organize actions on the ground. Schneider explains that on September 17, approximately 2,000 protesters gathered at the charging bull, a few blocks from Wall Street.[100] The initial plan was to hold a mass assembly at the Chase Manhattan Plaza to decide on the next steps

[98] Mattathias Schwartz, "Pre-Occupied," *New Yorker*, November 21, 2011, https://www.newyorker.com/magazine/2011/11/28/pre-occupied.

[99] Source: Adbusters, "The Poster That Launched a Movement (Or Not)," Design Observer, April 20, 2012, http://designobserver.com/feature/the-poster-that-launched-a-movement-or-not/32588.

[100] Schneider, *Thank You, Anarchy*, 37–8.

of the movement. After learning that this location was blocked off, organizers decided to occupy Zucatti Park, which eventually became the base of operations for the occupation.[101] The movement started receiving media attention as protesters were injured or arrested during the subsequent weeks. For instance, the media provided heavy coverage on a woman who was pepper sprayed without apparent reason and an incident in which 700 protesters were arrested on the Brooklyn Bridge.[102] As the movement received more media attention, the occupation grew and resulted in a series of large-scale protests over the course of the following months. As OWS became more and more publicized in the news and on social media, Occupy Wall Street bases of operations began sprouting all over the U.S. and the world. During its peak, the movement had presence in 951 cities and 82 countries.[103]

While the movement spread very quickly and received significant amounts of local and international attention, it has been criticized for its failure to achieve concrete political results.[104] The primary reason for this inability is that it did not produce objective demands that corresponded to their primary grievance—economic inequality. This stems from the movement's intentional decentralized and horizontal organizational structure, which resisted official political goals.[105] However, while the movement did not achieve immediate political effects, concluding that it was a failure may not be a fair assessment. The movement certainly shed light on some of the United States' major institutional deficiencies, which may have facilitated indirect effects. For example, Megan Leonhardt explains that the movement helped frame economic inequality for the American people.

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[101] Nathan Schneider, "From Occupy Wall Street to Occupy Everywhere," *The Nation*, October 12, 2011, https://www.thenation.com/article/occupy-wall-street-occupy-everywhere/.

[102] Schneider.

[103] Bill Chappell, "Occupy Wall Street: From a Blog Post to A Movement," NPR, October 20, 2011, https://www.npr.org/2011/10/20/141530025/occupy-wall-street-from-a-blog-post-to-a-movement.

[104] Michael Levitin, "The Triumph of Occupy Wall Street," *The Atlantic*, June 10, 2015, https://www.theatlantic.com/politics/archive/2015/06/the-triumph-of-occupy-wall-street/395408/.

[105] "'Occupy Wall Street' Protests Gain Steam, but Movement's Goals Remain Unclear," *Washington Post*, October 3, 2011, https://www.washingtonpost.com/business/occupy-wall-street-protests-gain-steam-but-movements-goals-remain-unclear/2011/10/03/gIQAjZNjIL_story.html.

This framing process fed into the Democratic Party's policies. For example, Bernie Sander's policies during the 2016 Presidential campaign, in many ways, resemble tenets of the OWS Movement.[106]

2. Occupy Wall Street Movement and Relationships

Similar to the Egyptian revolution, OWS made use of social networks to propagate its message and build momentum. This use of social networks amounted to the development and sustainment of key relationships that helped the movement progress. This section explores the relationships built during the lead up to and growth of the movement.

The movement was initially built upon several smaller activist groups that had coaligned goals during the led up to September 17, such as Anonymous, New Yorkers against Budget Cuts, Operation Empire State Rebellion, and the U.S. Day of Rage. All of these organizations were pursuing political and economic change within the United States; all were planning major demonstrations between June and October and experienced varying degrees of success.

This characteristic is illustrated in several sources including David Degraw's account of his participation in OWS. Operation Empire State Rebellion, led by Degraw, was coordinating demonstrations for June 14. While Degraw was a significant figure in the OWS movement, his activism began years prior to the movement's start. Most notably, his literature explored the "99%" paradigm. After writing several journal articles on the subject, he began to develop a transnational, online "99% movement" against "neo-liberal economic domination." As the Arab spring gained momentum, his focus shifted toward Egypt and Tunisia. During this period, he built relationships with the cyber activist movement called Anonymous, which assisted revolutionaries in the Middle East by keeping their communications secure from government surveillance. The partnership grew when several of the Anonymous members helped reconstitute his website after it was shut down by multiple cyber-attacks. Taking inspiration from his contributions to the Egyptian revolution, Degraw envisioned demonstrations of similar magnitude in NYC under the

[106] Megan Leonhardt, "Occupy Wall Street: Lasting Effects of the Movement on its 5th Anniversary," *TIME*, September 16, 2016, http://time.com/money/4495707/occupy-wall-street-anniversary-effects/.

banner of "99%." His movement and members of Anonymous eventually collaborated to create a new activist force called "A99." The new group called for major demonstrations in NYC on the July 14, which were codenamed "Operation Empire State Rebellion." The call to action received significant online and media attention.[107] However, this attention did not equate to real action. On June 14, only sixteen people showed up to the event.[108]

This failure, however, did not dissuade Degraw and his group. After the June 14 failure, A99 sought out the organizers of New Yorkers against Budget Cuts (NYABC) to assess the potential for collaboration.[109] As the group's name suggests, its aim was to protest against governmental budget cuts. The groups demanded the "mayor to tax banks and corporations rather than cut social services and education."[110] The NYABC modeled its operations off the Spanish Indignados Movement which campaigned against austerity earlier in 2011. The Indignados movement centered on a non-hierarchical system called "general assemblies," where all members of the movement could provide input, and decision-making was implemented by consensus only.[111] This occupation yielded less than 200 protesters from June 16 to June 29. A99 discussed the potential for future collaboration with organizers of the NYABC. Being that the two had similar goals, the NYABC obliged Degraw on his offer.[112]

A group called the Day of Rage was also planning demonstrations during this time. Alexa O'Brien, the group's primary organizer, was focusing on setting up a "day of rage" to protest political corruption. In particular, her group planned to protest special interest

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[107] David DeGraw, "The History & Evolution of the 99% Movement ~ Economic Elite vs. the People: 2012 Anniversary Update," *David DeGraw* (blog), June 26, 2014, https://daviddegraw.org/the-history-evolution-of-the-99-movement-economic-elite-vs-the-people-2012-anniversary-update/.

[108] Schneider, *Thank You, Anarchy*, 21.

[109] Manuel Castells, *Networks of Outrage and Hope: Social Movements in the Internet Age* (Hoboken, NJ: John Wiley & Sons, 2013), 161.

[110] "On the Line," *The Progressive* 75, no. 9 (September 2011):10, http://search.proquest.com/docview/905172316/abstract/6648EB223CF54383PQ/1.

[111] Writers for the 99%, *Occupying Wall Street: The Inside Story of an Action That Changed America* (Chicago: Haymarket Books, 2011), 7.

[112] DeGraw, "History & Evolution of the 99% Movement."

groups and pledge support for free and fair elections.[113] The group was relatively large with 7,000 members, and it had representatives in multiple sates.[114]

In short, there were multiple organizations operating on the same ideological wavelength and planning events around the same time. These organizations, however, initially operated independently of each other. This characteristic changed after Adbuster's put out its call to Occupy Wall Street. The call provided a central platform that was ideologically general enough to facilitate interorganizational relationship building.

One by one the above organizations placed themselves under the banner of this call to action. For instance, Nathan Schneider states that after several email correspondences with Adbusters, NYABC hosted the first preparatory meeting for the upcoming 17 September occupation. The Group incorporated its assembly-centric structure into the meeting, which gave all participates involved a voice in the planning.[115] An A99 member going by the alias Gary Roland helped identify the best place to occupy based on his previous engineering experience working for the city.[116] Alexa Obrien later threw her group's support behind the budding Occupy Wall Street movement and assisted with the coordination.[117] A99 helped frame the movement using the 99% paradigm as stated earlier in this chapter. Ultimately the Adbusters message acted as a bridge for interorganizational cooperation that eventually became the framework for the Occupy Wall Street Movement.

In addition to the initial relationships that helped forge the base of OWS, the movement developed external relationships to build support and momentum. Relationships were built between the movement organizers and labor unions. For instance, Peter Wallston explains that labor groups helped "provide office space, meeting rooms, photocopying

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[113] Dustin Slaughter "America's Day of Rage Is Coming, and It's Just the Beginning," The Public Record, August 23, 2011, http://pubrecord.org/commentary/9654/americas-coming-its-beginning/.

[114] Sean Captain, "The Inside Story of Occupy Wall Street," Fast Company, October 7, 2011, https://www.fastcompany.com/1785918/inside-story-occupy-wall-street.

[115] Schneider, *Thank You, Anarchy*, 24.

[116] Schneider, 37.

[117] Captain, "Inside Story of Occupy Wall Street."

services, legal help, food, and other necessities to the protesters." In return, occupy activists assisted unions in "ratcheting up actions against several New York firms involved in labor disputes with workers."[118] OWS's organizational structure primarily consists of a loosely organized general assembly. The assembly afforded any participant the ability to discuss goals or any topic of relevance. The assembly was informally broken down into loosely grouped committees that focused on various aspects of the movement.[119] One of these committees focused on labor and union outreach. It eventually built a relationship with the American Federation of Labor and Congress of Industrial Organizations (AFL-CIO). The AFL-CIO's executive council held a conference call with OWS organizers. During the call, the two groups discussed strategies for mutual support.[120] One example of the labor-OWS relationship is the mutual support provided in a march against Verizon. Marguerite Reardon notes that on October 20 about 1000 protesters affiliated with Communications Workers of America Union occupied a space outside of the Verizon building in Manhattan.[121] In another episode of protest, OWS activists projected a "99% bat signal" on Verizon's Headquarters.[122]

3. OWS and Social Network Analysis

Certain aspects of the OWS network can be illustrated by Twitter. Social network analysis of OWS messaging illustrates the outward expansion of the movement. It also shows that activist networks are more central to the OWS network rather than mainstream news organizations.

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[118] Peter Wallsten, "Occupy Wall Street and Labor Movement Forming Uneasy Alliance," *Washington Post*, October 20, 2011, https://www.washingtonpost.com/politics/occupy-wall-street-and-labor-movement-forming-uneasy-alliance/2011/10/19/gIQAkxo80L_story.html.

[119] Schneider, *Thank You, Anarchy*, 31.

[120] Steven Greenhouse and Cara Buckley, "Major Unions Join Occupy Wall Street Protest," *New York Times*, October 5, 2011, https://www.nytimes.com/2011/10/06/nyregion/major-unions-join-occupy-wall-street-protest.html.

[121] Marguerite Reardon, "Verizon Workers to Join Occupy Wall Street Protest," CNET, October 20, 2011, https://www.cnet.com/news/verizon-workers-to-join-occupy-wall-street-protest/.

[122] Dashiell Bennett, "How Did They Project That Occupy Wall Street Message on the Verizon Building?," *The Atlantic*, November 18, 2011, https://www.theatlantic.com/national/archive/2011/11/how-did-they-project-occupy-wall-street-message-verizon-building/335321/.

a. Data Overview

The following parameters further describe the Twitter sample used in this analysis. Relational and attributional ties within this network are represented digitally on Twitter. The dataset captures tweets, replies, follows, and mentions. Each data entry reflects the Occupy Wall Street Movement. To capture this movement, tweets containing the tag #occupywallstreet were collected on 14 November 2011. In total, 3,593 edges and 747 nodes (after removing isolates) were collected. The data were collected from the Twitter Application Program Interface (API) using NodeXL's scraping function. The dataset does not represent 100% of all tweets tagged with #occupywallstreet. Rather, Twitter provides samples based on search queries. Queries most likely have access to less than 10% of Twitter's total data. Furthermore, Twitter's data distribution processes through the API is unknown. This particular NodeXL data set was collected by NodeXL administrators and disseminated on the NodeXL graph gallery.

Figure 7 is a sociograph that depicts the Twitter network for users who mentioned #occupywallstreet. After running a modularity algorithm on the data, the network was broken into 12 subgroups. These groups are illustrated by color. Node size corresponds to in-degree centrality. The graph appears to be a hub and spoke network, indicating that central nodes play large role in transferring information.

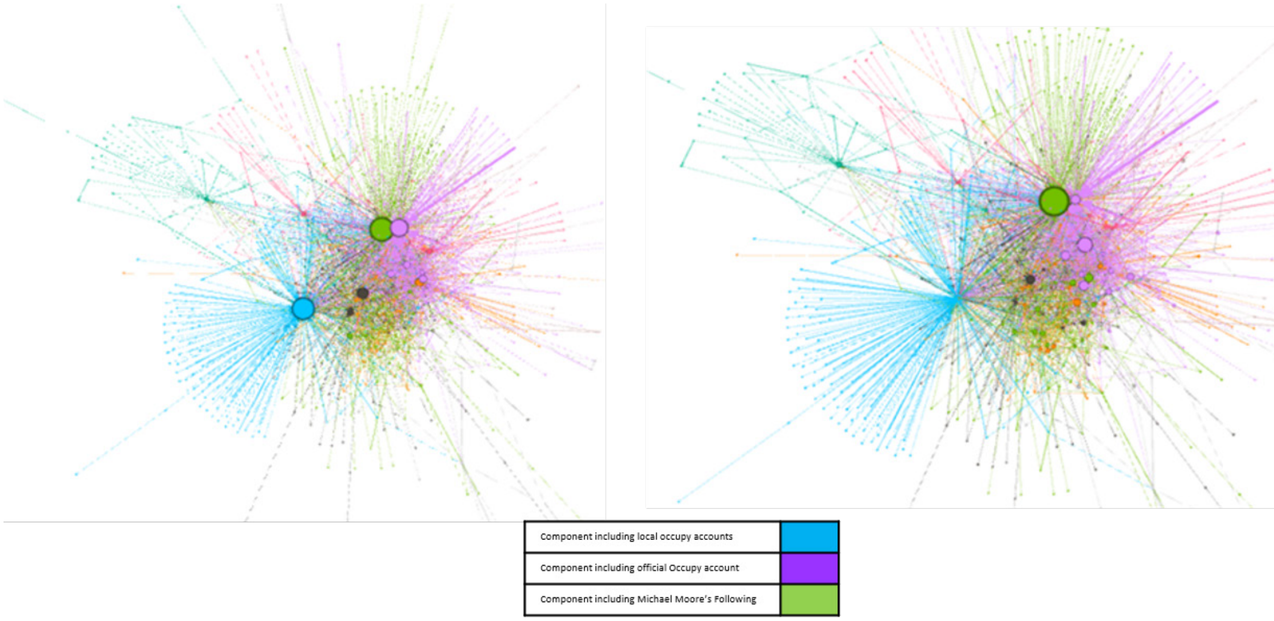

Figure 7. Occupy Wall Street Twitter Network[123]

When assessing the in-degree, betweenness, and out-degree centrality, several observations can be made. Table 2 shows the Twitter accounts with highest centralities. First, six of the twenty accounts are regional and local Occupy Wall Street accounts. This shows the outward expansion of the movement to other cities. Second, there is only one mainstream news organization in the list—*The Atlantic*.

123 Adapted from Ceni, Arber, and Marc Smith. Occupy Wall Street Twitter Data-set from NodeXL. Raw data. NodeXL, California.

Table 2. Occupy Wall Street Twitter Accounts with Highest Centralities[124]

Id	outdegree	Id	Betweeness Centrality	Id	indegree
usgeneralstrike	28	occupywallst	72952.67	occupywallst	353
deprogrammer9	26	usgeneralstrike	35133.87	nyclu	257
indigojourney	23	indigenous_rage	20557.47	occupydenver	93
indigenous_rage	22	nyclu	19472.29	blogdiva	89
catherina_news	19	blogdiva	18941.19	usgeneralstrike	86
jiraffa	19	occupypics	17516.17	occupydallas	60
nurseagita	19	genknoxx	13433.94	lolgop	47
occupyofficial	17	deprogrammer9	10869.55	occupynj	44
evilmatthew	15	davidbadash	10050.99	leecamp	37
occupywallst	14	catherina_news	9335.51	occupypics	27
leecamp	14	mississippidem	8271.43	indigenous_rage	25
mississippidem	13	occupynj	8230.81	catherina_news	18
occupynj	12	joy__hart	8216.47	deprogrammer9	17
joy__hart	12	leecamp	7687.42	davidbadash	16
db_s_turbosnail	12	anonymiss8	7568.58	nurseagita	16
occupypics	11	lolgop	5530.02	genknoxx	11
genknoxx	11	occupydallas	4760.1	joy__hart	11
occupydallas	10	jiraffa	4404.5	mississippidem	10
occupydenver	10	evilmatthew	4202.59	anonymiss8	10
anonymiss8	9	indigojourney	4140.84	jiraffa	10
lolgop	9	occupydenver	4131.1	indigojourney	10
davidbadash	8	nurseagita	4003.54	db_s_turbosnail	9
nyclu	7	occupyofficial	3988.85	evilmatthew	8
blogdiva	7	db_s_turbosnail	3687.79	occupyofficial	5

The three largest groups were extracted from the network. The official Occupy Wall Street Twitter account falls in the green group. All other groups fall into the red group.

From the below graph in Figure 8, it appears that various OWS sites tended to be the primary disseminators of information, while news organizations were less central to the network. This is surprising since the movement seemed to enjoy significant amounts of attention domestically and internationally. These findings were compared to another

[124] Adapted from Ceni, Arber, and Marc Smith. Occupy Wall Street Twitter Data-Set from NodeXL. Raw data. NodeXL, California.

dataset with the same search parameters, except the data was pulled on 10 October. In this list, Kat Mckinley, a blogger for the *Houston Chronical,* had the second highest betweenness centrality. She was the only mainstream media news source in the top actors by betweenness centrality.[125]

[125] Marc Smith, "20111010-NodeXL-Twitter-Occupywallstreet OR #ows Network Graph," flickr, October 10, 2011, https://www.flickr.com/photos/marc_smith/6232945955/.

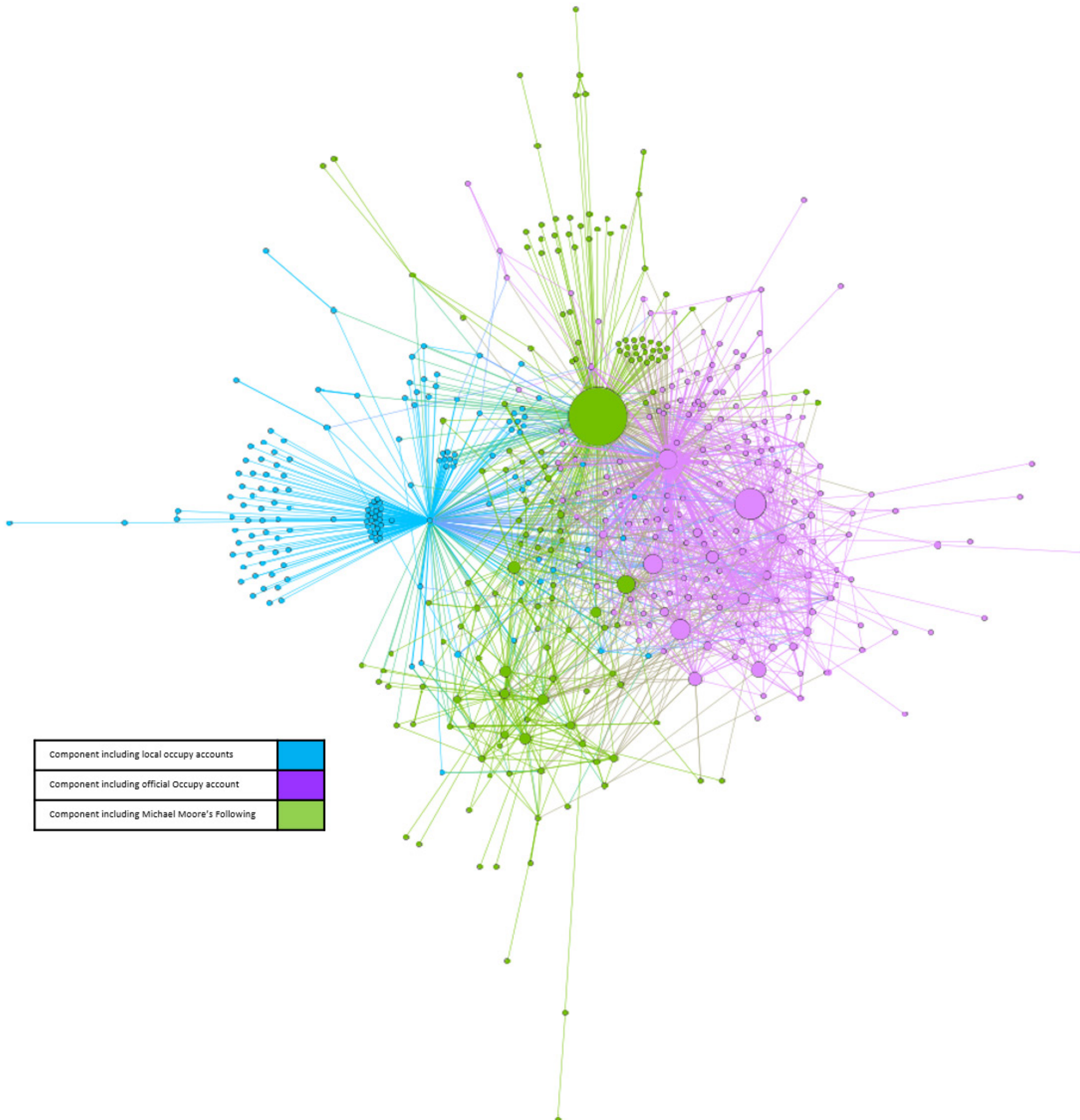

Figure 8. Three Largest Components within the OWS Network[126]

The above graph is only a sample of the Twitter posts on 14 November; thus, like all small samples, false positives could exist. However, there is literature commenting on inconsistent media coverage of the movement. For instance, a report by PEW research

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[126] Adapted from Ceni, Arber, and Marc Smith. Occupy Wall Street Twitter Data-Set from NodeXL. Raw data. NodeXL, California.

center stated that between 13–16 October OWS accounted for approximately 10 percent of the newshole.[127] This could be compared to January 31-February 6, where approximately 56% of the newshole focused on the Egyptian revolution.[128]

C. COMPARATIVE ANALYSIS

The Occupy Wall Street Movement and the Egyptian Revolution have several notable similarities and differences. They are similar in that both movements involved the collaboration of smaller activist organizations with similar goals. In both cases, this unity of effort helped build operational momentum and mobilize people. Second, both used social media to advance their efforts. They used social media platforms to spread information about protests and post illustrative content about the movement.

While each movement had similar characteristics, there are key differences, which may explain their varying trajectories. First, the different environmental context of each movement may have led to different characteristics of each network. The authoritarian nature of Mubarak's regime made the environment more restrictive and far more dangerous than the Occupy Wall Street Movement. For example, Liam Stack explains that many protesters were physically injured or even killed during protests. Movement leaders like Ahmad Maher were eventually captured and tortured for protesting.[129] These actions may have caused the leaders of organizations within activist networks to feel embattled or under constant threat. As Colin Jennings notes, the presence of an external threat can increase a group's social capital,[130] which includes networks of trust between actors.[131] The

[127] "Growing Attention to Wall Street Protests," Pew Research Center, October 19, 2011, http://www.people-press.org/2011/10/19/growing-attention-to-wall-street-protests/.

[128] "The Fall of Mubarak and the Media," Pew Research Center, February 12, 2011, http://www.journalism.org/2011/02/12/pej-news-coverage-index-february-713-2011/.

[129] Liam Stack, "Politics on Facebook Brings Trouble for Young Egyptian," *Christian Science Monitor*, July 7, 2008, https://www.csmonitor.com/Technology/Responsible-Tech/2008/0707/politics-on-facebook-brings-trouble-for-young-egyptian.

[130] Colin Jennings and Santiago Sanchez-Pages, "Social Capital, Conflict and Welfare," *Journal of Development Economics* 124 (January 2017): 157, https://doi.org/10.1016/j.jdeveco.2016.09.005.

[131] Benjamin Six et al., "Trust and Social Capital in the Design and Evolution of Institutions for Collective Action," *International Journal of the Commons* 8, no. 1 (March 2015): 151–76, https://www.thecommonsjournal.org/articles/10.18352/ijc.435/.

heightened risk associated with protest and the identification of the Mubarak Regime as a threat could have increased social capital amongst the Egyptian Revolution organizations. This may have facilitated meaningful collaboration during the revolution. This is illustrated by the frequent cross-ideological coordination that occurred during movement as noted by Mustafa Bal.[132] For instance, democratic organizations such as the April 6 Movement worked alongside the Muslim Brotherhood, which is an Islamic fundamentalist organization.[133]

In addition, much of the youth activist network in Egypt was quite experienced by 2011. For instance, Maha Abdelrahman notes that in the mid-2000s, Egypt experienced a significant uprising in response to poor working conditions and low wages. From this, activists from the Labor Party and al-Ghad led a general strike against textile companies.[134] They set up a Facebook page and called for demonstrations on April 6, 2008. Many other activist groups voiced their support, such as the Muslim Brotherhood, and Kefya.[135] The success of these demonstrations led to the establishment of the April 6 organization. The 2011 uprising had a similar construct to that of 2008.[136] This means that the revolutionaries that led the initial uprisings were practiced in the art of protest and collaboration was normalized into the activist culture, at least on an organizational level. As Stuart Schaar notes, the Egyptians "did not break out suddenly in reaction to local events. The youthful leadership had time to develop the theoretical bases for revolution and benefit from experiences elsewhere, thereby allowing them to avoid pitfalls stemming

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[132] Mustafa Bal, "Anatomy of a Revolution: The 2011 Egyptian Uprising" (PhD diss., Columbia University, 2014), 113.

[133] Fahed Al-Sumait, Nele Lenze, and Michael C. Hudson, *The Arab Uprisings: Catalysts, Dynamics, and Trajectories* (Rowman & Littlefield, 2014), 126.

[134] Maha Abdelrahman, *Egypt's Long Revolution: Protest Movements and Uprisings* (New York: Routledge, 2014), 126.

[135] Ramsey Dahab, "Egyptian Activism in the Modern Era and the Role of Information and Communication Technologies (master's thesis, Florida International University, 2012), 55.

[136] Hossam el-Hamalawy, "Egypt's Revolution Has Been 10 Years in the Making | Hossam El-Hamalawy," *The Guardian*, March 2, 2011, sec. Opinion, https://www.theguardian.com/commentisfree/2011/mar/02/egypt-revolution-mubarak-wall-of-fear.

from inexperience."[137] Conversely, the Occupy Wall Street Movement had not worked together previously. This is not to say that the Occupy Wall Street Movement did not have its share of experienced activists; but when compared to the Egyptian Revolution, the movement was not as normalized and established.

In addition, the Egyptian revolution had a central charismatic figure within the activist network. Although Wael Ghonim and his Facebook page dedicated to Khalid Said certainly did not command the revolution, he did serve as a rallying point for inspiration. The dreadful circumstances surrounding the Facebook page brought significant emotion to the protests. Conversely, Occupy Wall Street deliberately chose not to have any sort of central actor or leader. OWS placed its faith in a general assembly, which facilitated a horizontal organizational structure.

While both movements did not have a formal leader, the Egyptian Revolution had a higher degree of centralization. This centralization appears when organizational leaders make decisions for sub-movements within the revolution. For instance, the Revolutionary Youth Coalition was not an open forum for all to speak. As explained earlier in the chapter, it was run by a semi-hierarchical framework. Within the coalition, group leaders collaborated and debated the next steps of the revolution. This more centralized structure may have helped the movement build collective goals. Nevertheless, it should also be noted that the Revolutionary Youth Coalition did not last long. Thanassis Cambanis points out that a year and a half after its creation, the coalition fragmented. This was due to the Muslim Brotherhood's preeminence in Egyptian Politics and Mohamed Morsi's assent to the presidency.[138]

The Egyptian Revolution also had a higher degree of political connections. *The Nation* indicates that many of the activist organizations were, in fact, youth elements tied

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[137] Stuart Schaar, "Revolutionary Challenges in Tunisia and Egypt: Generations in Conflict," *New Politics* XIII, no. 3 (Summer 2011), http://newpol.org/content/revolutionary-challenges-tunisia-and-egypt-generations-conflict.

[138] Thanassis Cambanis, "Down but Not Out: Youth and Revolution in Egypt and Beyond," *World Politics Review*, December 16, 2014, https://www.worldpoliticsreview.com/articles/14682/down-but-not-out-youth-and-revolution-in-egypt-and-beyond.

to political parties. Examples of these are the Muslim Brotherhood, Youth Supporters of El Baradei, National Progressive Unionist Party, and Kefaya.[139] These connections to the government may have helped activist organizations in achieving political objectives. Conversely, official political affiliation within the Occupy Wall Street was generally avoided. The movement identified itself as a "leaderless resistance movement with people of many political persuasions."[140]

The social network analysis of the two groups also showed that the Egyptian Revolution attracted far more traditional media coverage than did the OWS. In fact, this aspect was a general point of contention within the OWS movement itself. For example, Eric Randall points out that many protesters voiced frustration about the inconsistent news coverage.[141] OWS's leaderless culture and non-hierarchical structure may explain some of this characteristic. Patrick Bruner, a college student, was the only official link to the media. He was a volunteer and had no experience in talking to news organizations.[142] This dynamic slowed down the official flow information to the press.

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[139] "Slide Show: Who's Behind Egypt's Revolution?," The Nation, February 16, 2011, https://www.thenation.com/article/slide-show-whos-behind-egypts-revolution/.

[140] Occupy Wall Street, accessed June 15, 2018, https://occupywallst.org/.

[141] Eric Randall, "Media Non-coverage of Occupy Wall Street Gets Lots of Media Coverage," *The Atlantic*, September 28, 2011, https://www.theatlantic.com/national/archive/2011/09/media-non-coverage-occupy-wall-street-gets-lots-media-coverage/337391/.

[142] Schneider, *Thank You, Anarchy*.

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III. SOCIAL NETWORKS AND BUSINESS MARKETING

A. INTRODUCTION

This chapter examines how the business sector uses or is affected by social networks. This includes an assessment of their internal marketing structures and how these companies leverage external social networks to influence their target audiences. The chapter deconstructs marketing and advertising campaigns from two major corporations—Pepsi's "Live for Now" and Coca-Cola's "That's Gold." These two campaigns were chosen due to the companies' similar organizational breadths and market niches. Chapter III provides a combination of qualitative and network analysis to evaluate each case. The chapter provides a contextual summary describing each case's goals and major events. It then examines how each company leveraged social networks to achieve their influence goals within the context of each campaign. This entails the how each company's internal marketing structure was designed to execute their campaign. It also includes an examination of how each campaign leveraged social networks within their target audiences. The chapter then illustrates components of the campaigns' marketing execution through social network analysis. Lastly, it comments on key similarities and differences between the two cases and discusses implications for Military Information Support Operations.

B. CASE III: PEPSI—"LIVE FOR NOW"

1. "Live for Now" Marketing Campaign: Background and Context

In April 2012 Pepsi decided to implement its first global marketing and advertising campaign called "Live for Now."[143] The decision emerged as part of a broad goal to innovate their communications strategy due to the changing nature of media within the 21st century. Scott Goodson notes that the advent of social media has complicated the nature of

[143] "Pepsi Launches First Global Campaign," Pepsico, accessed August 2, 2018, http://www.pepsico.com/live/pressrelease/Pepsi-Launches-First-Global-Campaign-Live-For-Now04302012.

those organizations involved in influence operations, especially businesses who disseminate information globally and within cross-cultural environments. The Internet and social media have dramatically increased international connectivity, and this presents both dangers and opportunities for large businesses like Pepsi.[144] PepsiCo's former CEO, Massimo D'Amore explains the company's strategy in 2012 in the following Ad Age article interview:

> The creation of the Global Beverage Group is a strategic shift and a "rite of passage" for the company, Mr. D'Amore said, noting that PepsiCo is transitioning from a multi-regional structure to a global company. A Global Snacks Group is also being analyzed. "[Before] it was more of a global coordination as opposed to a global management," Mr. D'Amore said. "Technology, both social networks and mobile platforms, have created this global generation. We really want to connect our global brands with the global generation, and the best way to do that is with global management.[145]

Pepsi's transition to a global marketing strategy is not uncommon. In recent years, other companies like Nike, McDonald's, and Toyota have invested heavily in global marketing programs.[146] Global marketing involves identifying and projecting a message that can "transcend geography and language, and which instills values and a way of living that is simple, and easy to align with."[147]

This was Pepsi's vision in developing the "Live for Now" Campaign. Brad Jakeman, Pepsi's Chief Marketing Officer, based the campaign on a ten-month market review that analyzed Pepsi's global consumer base to identify shared values, mindsets, and

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[144] Scott Goodson, "What The World Needs Now: Global Brands for the Global Generation," *Forbes*, August 2, 2011, https://www.forbes.com/sites/marketshare/2011/08/02/what-the-world-needs-now-global-brands-for-the-global-generation/.

[145] Natalie Zmuda, "Pepsi Beverage Guru Unveils His Plan to Win the World Over," Ad Age, July 11, 2011, http://adage.com/article/news/pepsi-beverage-guru-unveils-plan-win-world/228641/.

[146] Cory Levins, "Seven Companies That Paved the Way for Global Marketing," Air Sea Containers, January 10, 2018, http://www.airseacontainers.com/blog/seven-companies-paved-way-global-marketing/.

[147] Goodson, "What the World Needs Now."

belief systems.[148] Jakeman explained that "when you talk to Pepsi loyalists around the world, they over index on this desire to make the most of every moment."[149] This insight fed the general theme of "Live for Now"—Pepsi is a brand that relates to living life "in the moment." To implement this narrative, the campaign centered on connecting Pepsi's consumer base to the exciting and often fleeting aspects of pop culture around the world. Victor Khachatryan notes that in addition to wide-release pop culture-themed commercials and creative digital content, Pepsi launched a series of concerts and released several music videos to promote their new marketing position.[150] In conjunction with this, Pepsi launched "Pulse," which is a comprehensive social media-driven interactive digital "dashboard" that curates and displays content relevant to Pepsi's target audiences throughout the world. It also serves as a venue for celebrities to interact with fans. The dashboard curates and reposts trending pop culture media content. In an interview with the media website Mashable, Shiv Singh, global head of PepsiCo's digital operations, stated that "Pepsi Pulse is a cheat sheet for pop culture"[151] and that Pepsi's goal for the dashboard is to reconnect the Pepsi brand to the "heart of pop culture."[152]

Upon its implementation, the campaign depended upon celebrities to drive the link between Pepsi and pop culture. Christopher Heine explains that as part of the campaign, Pepsi developed celebrity advocate partnership deals with icons such as Beyoncé and Nikki Minaj. These celebrities advocated for Pepsi during media events, concerts, and promotions around the world.[153]

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[148] Jennifer Rooney, "Pepsi's Brad Jakeman and Simon Lowden Explain Rationale Behind New 'Live for Now' Global Campaign," *Forbes*, May 7, 2012, https://www.forbes.com/sites/jenniferrooney/2012/05/07/pepsis-brad-jakeman-and-simon-lowden-explain-rationale-behind-new-live-for-now-global-campaign/.

[149] Rooney.

[150] Victor Khachatryan, "How Corporations Use Social Media: An Exploratory Study" (thesis, Pace University, 2014), 13.

[151] Brian Anthony Hernandez, "Pepsi Unwraps 'Pulse' Digital Dashboard for Pop Culture," Mashable, April 30, 2012, https://mashable.com/2012/04/30/pepsi-pulse-live-for-now/.

[152] Anthony Ha, "Pepsi Puts a Pop Culture 'Cheat Sheet' at the Heart of its New Campaign," *TechCrunch* (blog), April 30, 2012, http://social.techcrunch.com/2012/04/30/pepsi-live-for-now/.

[153] Christopher Heine, "Pepsi and Beyoncé's $50M Duet [Updated]," Ad Week, December 11, 2012, https://www.adweek.com/brand-marketing/pepsi-and-beyonc-s-50m-duet-updated-145855/.

Reality TV star, Kendall Jenner, also partnered into “Live for Now” in 2017, which ultimately led to a setback in the campaign’s progress. Over the course of the multi-year campaign, Pepsi shifted components of its advertising content toward social progression—a narrative that seems to contradict its emphasis on entertainment. To accomplish this, Pepsi appeared to develop media content focused on current social issues like the Black Lives Matter Movement. This characteristic became clear when in April 2017, Pepsi released a 2:39-minute video depicting what seemed to be a vague confrontation between civil rights activists and riot police as described by Daniel D’Adario. Jenner, in a nearby photoshoot, sees the confrontation and moves to intervene. She hands a riot officer a Pepsi, which immediately diffuses the tension on both sides. The scene cuts away with the activists cheering and the police appearing more relaxed.[154] Upon its release, the commercial drew a firestorm of negative media, especially from civil rights activists who believed the ad trivialized serious, systemic social issues in the United States.[155] A day later, Pepsi recalled the video and issued an official apology:

> Pepsi was trying to project a global message of unity, peace, and understanding. Clearly, we missed the mark, and we apologize. We did not intend to make light of any serious issue. We are removing the content and halting any further rollout. We apologize for putting Kendall Jenner in this position.[156]

While the ad has become infamous within the marketing community and been deemed a failure, it is unfair to say that the entire “Live for Now” campaign was unsuccessful. The video represents a blemish on an otherwise excellent and comprehensive

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154 Daniel D’Addario, “Kendall Jenner Pepsi Ad: Why It’s a Glaring Misstep,” *TIME*, April 5, 2017, http://time.com/4726500/pepsi-ad-kendall-jenner/.

155 Daniel Victor, “Pepsi Pulls Ad Accused of Trivializing Black Lives Matter - The New York Times,” accessed August 23, 2018, https://www.nytimes.com/2017/04/05/business/kendall-jenner-pepsi-ad.html.

156 Jacqui Frank, “‘Clearly We Missed the Mark’: Pepsi Just Pulled This Controversial Ad,” Business Insider, April 5, 2017, https://www.businessinsider.com/pepsi-pulled-controversial-ad-kendall-jenner-2017-4.

information campaign. Shiv Singh indicates that that the campaign increased consumer engagement on social media and better positioned Pepsi within the beverage market.[157]

Figure 9. Kendall Jenner during Pepsi's "Live for Now—Moments Anthem"[158]

2. Pepsi's Internal Marketing Networks

This section examines the internal organizational network Pepsi leveraged to develop the "Live for Now" Campaign and contextualizes Pepsi's failed ad by examining this network's evolution throughout the past two decades. Research indicates that Pepsi's marketing success is based in its long-term ability to cultivate a large network of external marketing agencies capable of producing talent and creating content to support any objective. Pepsi's advertising failures seemed to occur as they attempted to transition their marketing network to a more efficient structure that, consequently, insulated the company from outside perspectives.

[157] Shiv Singh, "Pepsi Digital Disruption," presented at the ANA Digital Conference, SlideShare, March 8, 2014, https://www.slideshare.net/shivsingh/pepsi-ana1.

[158] Source: "Pepsi 'Live for Now Moments Anthem' Starring Kendall Jenner," The Hollywood Reporter, April 5, 2017, https://www.hollywoodreporter.com/video/pepsi-live-moments-anthem-starring-kendall-jenner-991310.

Pepsi's marketing structure is based upon a network of semi-autonomous agencies that when leveraged together, have the capacity to run large-scale, strategic messaging campaigns. At the center of Pepsi's marketing strategy is a corporation called Omnicom. Monle Lee and Carla Johnson explain that this company was born out of the cooperate merger boom in the 1980s.[159] This "mega-merger" influx was catalyzed by the British Ad agency, Saatchi & Saatchi (S&S). In the 1970s the Saatchi cooperation began acquiring smaller agencies to expand the company's operational reach within the UK.[160] As the corporation grew in size, it expanded its reach to the United States becoming the "first company to be traded on the London, New York, and Tokyo stock markets"[161] Other advertising agencies, threatened by this growth, heeded S&S's business decisions and took drastic action to stay competitive within the market.[162] Batten, Barton, Durstine & Osborn (BBDO), Needham Harper & Steers, and Doyle Dane Bernbach, three major US-based agencies, announced their merger just ten days after S&S acquired Ted Bates.[163] The merger was founded on a relationship between the CEOs of BBDO and Neeham Harper & Steers, Allen Rosenshine and Keith Reinhard. The two CEOs' relationship strengthened due to the emergence of S&S as a common enemy. Rosenshine explains:

> With the brothers [S&S cofounders] on an acquisition rampage, Keith and I shared the same concern—either or both of our companies could conceivably become takeover targets to help fulfill the Saatchis' dream of an advertising empire...I called him and suggested we get together…We met, we talked, and we agreed on practically everything important to a

[159] Monle Lee and Carla Johnson, *Principles of Advertising: A Global Perspective*, 2nd ed. (New York: Routledge, 2013), 85.

[160] Andrew von Nordenflycht, "Conglomerates without (Alienable) Assets: Financial Intermediation and the Evolution of the Global Advertising Industry" (faculty paper, Simon Fraser University, 2005), 21, http://www-management.wharton.upenn.edu/raff/documents/HoldingCompanies-0505.pdf.

[161] von Nordenflycht, 21.

[162] "Omnicom Group," Ad Age, accessed August 8, 2018, http://adage.com/article/adage-encyclopedia/omnicom-group/98805/.

[163] Michael Tucker, "U.S. Advertising Agency Productivity," *Journal of Promotion Management* 2, no. 2 (June 6, 1994): 102, https://doi.org/10.1300/J057v02n02_07.

> potential merger that could strengthen our respective operations and fend off the brothers.[164]

The two executives eventually added Doyle Dane Bernbach (DDB) to the merger, which allowed Omnicom to unseat S&S from its short reign as the largest marketing agency in the World.[165] Here we see the coalescence of the U.S.-based marketing agency network due to the identification of a common enemy. This threat-based evolution is similar to the network formations of the Egyptian Revolution and OWS movement in that the developments were catalyzed by the perception of a threat—the inherent dangers presented by the Mubarak regime during demonstrations.

Over the next two decades, Omnicom went on to expand their organization significantly. By the year 2000 Omnicom Group included "three of the top 10 global ad agency networks, all based in New York: BBDO Worldwide, DDB Worldwide Communications, and Tragos Bonnange Wiesendanger Airoldi (TBWA) Worldwide."[166] Now, Omnicom is a holding company that manages five broad networks containing over 1,500 advertising agencies. These networks are BBDO, Diversified Agency Services, DDB, OMNICOM Media Group, and TBWA.[167] This structure provides large businesses like Pepsi with unprecedented access to a diverse talent pool capable of building media content to suit any marketing objective.[168] Critics of the structure were initially concerned that this super-agency model would reduce overall performance and creativity due to the increased bureaucracy associated with large organizations.[169] However, the diversity and quality of talent within each network is attributed to Omnicom's operating procedures. Julie Liesse explains that while the agencies within each network are subsidiaries, they are

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[164] Allen Rosenshine, *Funny Business: Moguls, Mobsters, Megastars, and the Mad, Mad World of the Ad Game* (New York: Beaufort Books, 2006), 68.

[165] Rosenshine, 66.

[166] Ad Age, "Omnicom Group."

[167] Ad Age, "Omnicom Group."

[168] "Holding Company," Ad Age, accessed August 8, 2018, http://adage.com/article/adage-encyclopedia/holding-company/98708/.

[169] Tucker, "U.S. Advertising Agency Productivity," 103.

generally autonomous in operations. The individual advertising agencies are bound together in a loose federation managed by Omnicom.[170] Thus, in some respects, individual agencies within the network are both allies and competitors.[171]

Omnicom, a corporate headquarters, assists operations by pursuing agencies' needs and linking clients with the right creative talent. A former Omnicom Vice President Explains:

> We are here in the background, trying to pull together what our agencies need to help their clients," says Omnicom Exec VP Bruce Redditt. "The agencies are our showcase; it's what the clients are here for. But we at the holding company are here to deal with questions like: Who do we have in the system who can do this? Or, what is our perspective on a certain topic—who are our subject matter experts? We pull together the teams that we need to deliver for our clients.[172]

Within Pepsi's marketing structure, Omnicom serves as a key broker that pairs business goals and objectives to the diverse array of talent within the agency network. This diversity was formed out of the environmental conditions that catalyzed initial merger and the company's subsequent acquisitions. Furthermore, *Advertising Age* notes that the creation of Omnicom represented the bonding of three peer companies, rather than a single company consuming all others. This allowed the businesses within the network to maintain their own distinct business culture.[173]

Ultimately, Omnicom's structure represents "coopetition." Rinse Jacobs explains that this strategy allows simultaneous and controlled cooperation between competing organizations within a single industry.[174] Studies have shown that this type of model has

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[170] Julie Liesse, "Talent Agency Heads: Collaborate Compete," *Omnicon*, October 9, 2006, 5, http://brandedcontent.adage.com/pdf/OmincomSection.pdf.

[171] Liesse, 6.

[172] Liesse, 6.

[173] Advertising Age, "The Holding Company Breakthrough: Omnicom at 20 Years," October 9, 2006, 5, http://brandedcontent.adage.com/pdf/OmincomSection.pdf.

[174] Rinse Jacobs, "Internal Coopetition as a Driver for Organizational Learning" (master's thesis, Umea School of Business and Economics, 2014), iv, http://www.diva-portal.org/smash/get/diva2:813227/FULLTEXT01.pdf.

a positive effect on businesses, especially pertaining to organizations' ability to learn and share information.[175] In the end, Omnicom's business model led to the company becoming a massive marketing and advertising organization equipped for any type of requirement, tailored to companies with large budgets.

In 2013 Pepsi sought to refine how the company integrated into Omnicom's network. Its goal was to bypass the traditional agency model and curate creative talent on the individual level. Brad Jakeman, Pepsi's Chief Marketing Officer, shared his opinion of the traditional ad agency set up during this period. He voiced his concern that the traditional Agency of Record or agency-to-campaign model lacked the diversity necessary to build messaging for cross-cultural target audiences adequately.[176] Jakeman's concerns seemed to manifest in the creation of a new marketing model within Omnicom in 2013. Together, Pepsi and Omnicom built an executive management platform dubbed "Galaxy," which was designed to draw talent from across multiple agencies within the network to support a single marketing project. The setup provided Pepsi with the ability to micro-tune talent for upcoming campaigns, thereby increasing content quality.[177] Jakeman was not "…interested in creating an entity within Omnicom that lived and breathed the Pepsi brand alone; he prefers those contributing to Pepsi advertising to have exposure working on other big brands, from autos to fashion."[178] However, this increased ability to curate creative talent posed several drawbacks. Because Galaxy required specialists from across multiple agencies, planning became more complicated. Projects required up to 18 months to plan and coordinate because the framework attempted to synchronize individual work schedules

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[175] Wenpin Tsai, "Social Structure of 'Coopetition' within a Multiunit Organization: Coordination, Competition, and Intraorganizational Knowledge Sharing," *Organization Science* 13, no. 2 (April 3, 2002): 188–89, http://libproxy.nps.edu/login?url=http://search.ebscohost.com/login.aspx?direct=true&db=bth&AN=6532488&site=ehost-live&scope=site.

[176] E.J. Schultz, "PepsiCo Exec Has Tough Words for Agencies," Ad Age, October 15, 2015, http://adage.com/article/special-report-ana-annual-meeting-2015/agencies-fire-ana-convention/300942/.

[177] Zmuda

[178] Natalie Zmuda, "Pepsi Marketers Test Unique Agency Model with Omnicom," Ad Age, April 8, 2012, http://adage.com/article/cmo-strategy/pepsi-marketers-test-unique-agency-model-omnicom/240755/.

of agencies with conflicting priorities.[179] The Galaxy model was initially used to plan and execute significant components of the "Live for Now" Campaign. For instance, E. J. Shultz explains that Pepsi drew creative talent from two small marketing agencies - within the Omnicom network—Lloyd & CO and Moondog. These agencies collectively developed a sequence of four commercials within the campaign.[180] Jakeman further explained the marketing system behind the campaign: "We curated this team of the best of Omnicom talent, cross functionally…Where advertising and digital and media and sales promotion worked together really across the board. The goal was to develop something that was immersive and not just an ad."[181]

Ultimately the Omnicom structure and Pepsi's use of the Galaxy platform are examples of large businesses attempting to streamline organizational networks to improve marketing and advertising quality. Rob Cross and Robert Thomas's book, *Driving Results through Social Networks,* indicates three main components that inhibit performance and innovation within a network: (1) fragmentation—the elimination of important ties within a network; (2) domination—central players within the network who dominate innovative thought; (3) insularity—the inability to recognize talent within a network.[182] The evolution of Pepsi's marketing structure seems to indicate an attempt to reduce insularity within the network. Omnicom acted as an information broker to a wide variety of creative talent within its agency network. As the relationship with Omnicom evolved, Pepsi sought to further reduce network insularity by creating the Galaxy model—a platform that could combine creative talent across multiple agencies. To do this, Pepsi reduced Omnicom's role as a gatekeeper to creative talent by introducing a collaborative platform by which

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[179] Jim Edwards, "Why Pepsi Can Take 18 Months to Make a New Ad," Business Insider, April 9, 2013, https://www.businessinsider.com/pepsi-takes-18-months-to-make-a-new-ad-2013-4.

[180] E.J. Schultz, "No Omnicom, No Beyonce: Pepsi Taps Small Shops for New Global Ads," Ad Age, January 27, 2015, http://adage.com/article/see-the-spot/pepsi-small-agencies-big-global-ads/296478/.

[181] Pepsico, "Pepsi Launches First Global Campaign."

[182] Robert L. Cross and Robert J. Thomas, *Driving Results through Social Networks: How Top Organizations Leverage Networks for Performance and Growth*, 1st ed. (San Francisco: Jossey-Bass, 2009), 47.

Pepsi and Omnicom marketing execs worked together to identify the right personnel for upcoming campaigns.

In 2015 however, Pepsi sought yet again, to change components of its marketing structure to cope with the evolving information environment. Pepsi execs looked to modify their marketing structure to account for the massive amount of content that the average viewer receives on a daily basis as well as adapt to the rapidly evolving nature of the information environment. Mark W. Shaefer notes that while advertising agencies provide major corporations with content that is authentic, credible, and resonates with target audiences, their rigorous, methodical workflow involving extensive pre-testing is often criticized for being too slow for the modern information environment.[183] Jakeman explains: "Instead of five pieces of content a year, a brand like Pepsi needs about 5,000 pieces of content a year…Instead of having six months to develop it, we have six hours or six days. And instead of it costing $2m, it needs to cost $20,000."[184] To compensate for this perceived requirement, Pepsi seems to have adjusted its marketing structure by developing an "in-house" content studio—an addition that provides the company with an organic capability to develop content similar to advertising agencies. Laura deLisa Coleman explains that in 2014, Pepsi announced the Creators League—a state of the art production studio capable of producing high-quality advertising content. Creators League Studio allowed Pepsi to bypass the agency model in some cases, work directly with creative talent, work faster, and produce high quality media products."[185] In addition to working with key brokers like Omnicom and the Galaxy model to find creative talent and produce content for certain projects, Pepsi intended to build a new talent-centric network. E. J. Shultz indicates that the Creators League would be central to this network—a nexus for

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[183] Mark W. Schaefer, "6 Reasons Marketing Is Moving In-House," *Harvard Business Review*, July 30, 2015, https://hbr.org/2015/07/6-reasons-marketing-is-moving-in-house.

[184] "PepsiCo Exec Challenges Agencies," WARC, July 12, 2016, https://www.warc.com/NewsAndOpinion/news/PepsiCo_exec_challenges_agencies/e9ddaf93-83f6-414d-975c-9328a6f97a6a.

[185] Lauren deLisa Coleman, "Think You Know What's Next after Netflix? Think Again," *Forbes*, March 31, 2017, https://www.forbes.com/sites/laurencoleman/2017/03/31/how-tv-erosion-success-of-netflix-originals-is-now-creating-a-huge-content-surge/.

organic content development.[186] In network analysis terms, Pepsi hoped to change the directional nature of its network. As it pertains to content development, Pepsi would reduce directional ties toward the rest of the network and increase the number of ties pointed from other nodes in the network to Pepsi.

Pepsi's development of the Creator's League Studio contributes to an ongoing debate concerning the merits of "efficient" in-house studios versus outsourcing content development to advertisement agencies. Marketing expert, Thomas Hobbs lists several risks associated with the in-house setup. One such risk centers on in-house studios' lack of outside perspective. Media content should reflect significant market research and pass through a myriad of scrutinizing eyes before it reaches the public. External agencies provide an extra layer of protection, which prevents advertising failures.[187] Advertising agencies push their content through their own quality control system. The content must then be approved by the client company. This separation provides marketing executives with the professional distance to remain objective in their assessment of the content. Marketing expert, Mark Ray explains, "When you walk in every day to the same corporate culture, you can't help but get swallowed up, to varying degrees, by that culture. The politics, the worries about job security, the sheer number of meetings where the brand is necessarily exalted in the extreme—these take a toll."[188] These internal dynamics may reduce a company's ability to assess their media products objectively.

"Live for Now - Moments Anthem" seemed to succumb to this dynamic. After the perceived tidal wave of negative feedback on social media, news outlets began to examine

[186] E.J. Schultz, "Pop Star: PepsiCo Makes Big Bet on In-House Content Creation," Ad Age, May 16, 2016, http://adage.com/article/cmo-strategy/pop-star-pepsico-s-big-bet-content-includes-a-movie/304004/.

[187] Thomas Hobbs, "Pepsi's Ad Failure Shows the Importance of Diversity and Market Research," *Marketing Week* (blog), April 7, 2017, https://www.marketingweek.com/2017/04/07/pepsi-scandal-prove-lack-diversity-house-work-flawed/.

[188] Mark Ray, "Pepsi Showed the Ultimate Downside of In-House Creative: A Lack of Perspective," Ad Week, April 6, 2017, https://www.adweek.com/brand-marketing/pepsi-showed-the-ultimate-downside-of-in-house-creative-a-lack-of-perspective/.

the organizational details behind the commercial.[189] While Pepsi kept much of the details surrounding the ad close-hold, journalists found that the commercial was developed by the Creators League Studio. The controversy surrounding the ad ignited intense debate about the need for outside agency perspective. Many marketing experts argued that cause of the marketing failure was due to Pepsi's in-house structure.[190]

It seems that this ad is a byproduct of Pepsi attempting to adjust their internal marking network to meet the demands of today's fast-paced information environment. Pepsi's transition disconnected the content development process from the vast array of talent typically procured by Omnicom and its subordinate agencies. While the Creators league may have increased Pepsi's efficiency, creative insularity within the network was also increased. This may have contributed to the ad's flop.

While Pepsi has not disclosed internal findings concerning the ads failures, Brad Jakeman commented on the subject after stepping down from his position a year after the ad was released. He states:

> We're [modern marketers] looking for "Do X percent of people like [or] dislike it; are they moved by it or not?" when in actual fact you can find yourself in hot water as a consequence of one to two people who happen to have a Twitter following of hundreds of thousands who are a smaller group in society that has a particular issue to move forward and don't respond positively to your work."[191]

Jakeman's statement indicates that the Ad's failure did not necessarily stem from a lack of market research or product pretesting. Rather, the failure occurred due to a small number of actors within Pepsi's social media network who catalyzed a backlash against the commercial. This phenomenon will be discussed later in the chapter.

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189 This is evident in news articles identified Pepsi's in-house studio as the commercial's production lead

190 Joe Pinsker, "How on Earth Does an Ad Like Pepsi's Get Approved?," *The Atlantic*, April 8, 2017, https://www.theatlantic.com/business/archive/2017/04/pepsi-kendall-jenner-ad-how/522423/.

191 Lisa Lacy, "Former PepsiCo Exec Brad Jakeman on What's Driving So Many Kendall Jenner-Like Brand Faux Pas," Ad Week, March 28, 2018, https://www.adweek.com/digital/former-pepsico-exec-brad-jakeman-on-whats-driving-so-many-kendall-jenner-like-brand-faux-pas/.

3. Pepsi's Use of Social Networks to Influence its Audiences

Pepsi leveraged social networks to help implement the "Live for Now" campaign. This section examines Pepsi's use of key influencers throughout the campaign and how these influencers assisted Pepsi in achieving campaign goals—specifically, cognitively connecting Pepsi and its target audiences to pop culture and entertainment. It also provides a contextual analysis that sheds light on Pepsi's failed Moments-Anthem ad. Findings indicate that Pepsi leveraged celebrities as influential nodes to drive the campaign. Social network analysis shows that Pepsi's network grew around central nodes, including Kendall Jenner. Findings also indicate that key individuals within Pepsi's information network amplified negative content about the app. These actors' Twitter posts correlate with the rapid expansion of Pepsi's social media network following the Moments Anthem's release. These characteristics indicate that while these influential individuals contributed to disrupting Pepsi's campaign by amplifying negative sentiment, they may not have changed the public's mind about the video.

The "Live for Now" Campaign's roots lie in a marketing technique called lifestyle campaigning. Sven Brodemerkel and Nicholas Carah explain this technique was pioneered by Pepsi in the 1960s.[192] This type of tactic attempts to embed a specific product—Pepsi cola, into a sought-after lifestyle. Lifestyle campaigns project a transitive function. That is, if a product is associated with an attractive lifestyle, using the product then brings consumers closer to achieving this lifestyle, and is thus preferable to its alternatives.[193] For instance, in 1963 began portraying its product as the choice of the next generation. Pepsi kept to this image ever since by relating its products to lifestyles attractive to young audiences or the "young at heart," thus allowing anyone who buys Pepsi products to be part of the hip crowd.[194]

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[192] Sven Brodmerkel and Nicholas Carah, *Brand Machines, Sensory Media and Calculative Culture* (New York: Springer, 2016), 18–19.

[193] Firas Kittaneh, "Use Content Marketing to Sell a Lifestyle, Not a Product," *Huffington Post*, February 18, 2015, https://www.huffingtonpost.com/firas-kittaneh/use-content-marketing-to-_b_6686278.html.

[194] Brodmerkel and Carah, 18-19.

Lifestyle campaigns are thus "closely connected to advertising practitioners" claim to be cultural intermediaries with an intuitive understanding of cultural trends—or at least, access to trendsetters and cultural vanguards that provide them with the necessary insights of how to connect lifestyle brands with cultural meanings."[195] The "Live for Now" campaign encapsulates this concept. During an Association of National Advertisers (ANA) digital Marketing Conference Presentation, Pepsi explained that "Live for Now" capitalized on real-time and live social experiences and is balanced with "Cultural Tentpoles."[196] These "tentpoles" are cultural activities that that boost attention and are responsible for driving the campaign forward.[197] "Tentpoles" are implemented using key cultural influencers that link Pepsi to a lifestyle focused on "living in the moment." More simply put, Justin Grandinetti states "The "Live for Now" Campaign's lifestyle focus is predicated heavily on Pepsi partnering with emerging entertainers or artists from a variety of disciplines, from music to sports."[198] Specifically, these partners—celebrity advocates, must ultimately help Pepsi embed its products into its intended lifestyle by portraying an air of living in the moment.

For companies like Pepsi, celebrity advocates are critical nodes within a target audiences' network. While most members of a specific target audience do not know these celebrities on a personal level, the tie created within the network is primarily cognitive. Jasmina Ilicic and Cynthia M. Webster note that this concept is explained by the Associative Network Theory. This theory compliments lifestyle campaigns and argues that "memory is structured as an associative network containing nodes (brand and celebrity nodes) connected via related links."[199]

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[195] Brodmerkel and Carah, 19.

[196] Singh, "Pepsi Digital Disruption," 3.

[197] "A Marketers Guide to Tentpole Marketing," Smart Insights, October 9, 2015, https://www.smartinsights.com/lead-generation/event-marketing/a-marketers-guide-to-tentpole-marketing/.

[198] Justin Grandinetti, "Cultural Imperialism and Globalization in Pepsi Marketing," *Lexia Undergraduate Journal* 1 (2013), http://www.jmu.edu/lexia/stories/volume1/grandinetti-pepsi-marketing.shtml.

[199] Jasmina Ilicic and Cynthia M. Webster, "Eclipsing: When Celebrities Overshadow the Brand," *Psychology & Marketing* 31, no. 11 (November 2014): 1040, https://doi.org/10.1002/mar.20751.

As members of a target audience consume celebrity advocacy media content, cognitive networks are formed that connect key concepts.[200] For instance, within the "Live for Now" Campaign, Beyoncé is one of Pepsi's primary celebrity advocates. Because of this, when consumers think of Pepsi, they also think of Beyoncé. Beyoncé is also linked to entertainment. Therefore, Pepsi becomes transitively connected to entertainment. Additionally, Pepsi deems that entertainment and pop culture associate with "living in the moment," so this concept is added to the consumers' semantic network as well. Also, her fame indicates she has broad cross-cultural appeal. In the end, when consumers are deciding on what soft drink to buy, they are expected to recall an emotionally positive semantic network, and Pepsi is central to that network.

Brand-celebrity partnerships can also be explained in terms of the physical information network, in addition to the cognitive dimension. Erin Bury indicates that celebrities act as opinion leaders. By virtue of their large following, they increase the brand's communication reach and help integrate the celebrities' fanbases into the company's consumer pool.[201]

4. Mismatches within the Network

While the "Live for Now" Campaign reaped positive results, the campaign's primary setback—the Moments Anthem video, appears to represent a mismatch between cultural context, Pepsi's target audience, and their influencing node—Kendall Jenner. The advertisement's social undertones seem to mark a shift toward cause marketing. John T. Gourville states that cause marketing is a targeted alliance between businesses and a social cause. The technique intends to increase the businesses' social standing in the eyes of its target audiences.[202] This deviates from the "Live for Now" Campaign's operational goal of connecting Pepsi to the entertainment world. Pepsi's shift within the context of "Live

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[200] Ilicic and Webster, 1041.

[201] Erin Bury, "Want to Take Your Business to the next Level? Clinch a Celebrity Endorsement," *Financial Post* (blog), May 20, 2013, https://business.financialpost.com/entrepreneur/fp-startups/celebrities-and-influencers-can-help-take-a-business-to-the-next-level.

[202] John T. Gourville and V. Kasturi Rangan, "Valuing the Cause Marketing Relationship," *California Management Review* 47, no. 1 (October 2004): 38, https://doi.org/10.2307/41166286.

for Now" created problematic imbalances within the commercial. For example, the Moment's Anthem contains jovial, entertainment-centric components and at the same time commented on systemic and negative social issues; Jenner—an entertainment icon comments on a serious social issue within the context of the entertainment community. The *New York Time's* Daniel Victor supports this assessment by indicating that the backlash concerning the ad seemed to revolve around Pepsi's trivialization of serious social issues like the Black Lives Matter movement.[203] Here, there seems to be a mismatch between the Pepsi-Jenner combo and the social issue at hand. Anne Vandermey comments on this in her *Fortune* interview with celebrity branding expert, Jeetendr Sehdev. She notes that in some respects, Pepsi's tie to Jenner is consistent as both are embedded within the entertainment industry. However, to Pepsi's target audience, Jenner and the advertisement's narrative is a conflicting arrangement. Within the commercial's context, Jenner and Pepsi may not have been influential or credible nodes when pertaining to serious social movements.[204]

5. Network Disruptions within the "Live for Now" Campaign:

While the Moments Anthem ad certainly did not have a positive effect on the brand's image, Brad Jakeman's counter-argument concerning the commercial is interesting. In a video interview months after the ad's cancelation, Jakeman explained that:

> When you get the data back [referring to advertising pretest data] you're trained as marketers to look for gross positives, and gross negatives, right, so you're looking for 20 percent of people said this, or thirty percent of people said [SIC] this, but we live in a world now where one person with fifty-thousand Twitter followers can have a significant impact on your brand.[205]

[203] Daniel Victor, "Pepsi Pulls Ad Accused of Trivializing Black Lives Matter," *New York Times*, April 5, 2017, https://www.nytimes.com/2017/04/05/business/kendall-jenner-pepsi-ad.html.

[204] Anne Vandrmey, "Kendall Jenner Pepsi Ad: How Brands Can Avoid Disaster," *Fortune*, April 6, 2017, http://fortune.com/2017/04/06/kendall-jenner-pepsi-ad-brand-lesson/.

[205] E.J. Schultz, "What Brad Jakeman Learned from the 'Gut-Wrenching' Backlash to Pepsi's Jenner Ad," Ad Age, November 16, 2017, http://adage.com/article/cmo-strategy/brad-jakeman-gut-wrenching-pepsi-jenner-ad/311344/.

In the interview, Jakeman indicates that the commercial was certainly tested with key audiences, and the results were most likely favorable. However, individual actors with significant followings possessed the ability to sway consumers for or against the campaign.

Jakeman's assessment is supported by a poll executed by Morning Consult, which was disseminated shortly after the commercials release. The poll surveyed 2,202 adults about the advertisement. Surprisingly, 44% of adults who watched the advertisement had a more favorable view of Pepsi while 25% stated they had a less favorable view of the company.[206] Furthermore, Morning Consult administered a real-time analysis of respondents' feelings toward the video. The results of the analysis are shown in Figure 10. The analysis tracked respondents based on political affiliation. Republican respondents were generally more critical of the video except during its most controversial point—when the Pepsi can was handed to the police offers.

[206] "National Tracking Poll 170404," POLITICO, accessed October 27, 2018, 8, https://www.politico.com/f/?id=0000015b-5fb9-da80-afdf-dfffc1540000.

Figure 10. Morning Consult Depiction of Sentiment toward the Moments Anthem Commercial[207]

Morning Consult's report indicates that the title wave of negative feedback was not completely organic to Pepsi's target audiences. Rather the negative feedback may have stemmed from more vocal and influential actors.

To further explore this dynamic, network analysis is used to examine the social media environment as Pepsi disseminated its commercial. Specifically, it explores how key communicators within Pepsi's Social Media network affected the information environment. This includes Kendall Jenner and other actors that Pepsi did not forecast.

The analysis examines message data from April 4, 2017 through April 8, 2017, and the data were collected by NodeXL. The dataset reflects relational ties between actors on Twitter. These ties represent tweets, replies, follows, and mentions. Each data entry reflects responses to Pepsi's commercial. To capture responses, tweets containing the keyword, "Pepsi" were collected during the latter period. In total, 9,230 nodes and 10,579 edges were collected. Throughout this analysis, isolates were removed to more efficiently analyze interesting components of the network. Node XL initially collected the data by accessing

[207] Source: "Watch People React to Pepsi's Ad in Real Time," Morning Consult, April 11, 2017, https://morningconsult.com/2017/04/11/watch-people-react-pepsis-ad-real-time/.

Twitter's API. Because of this, the dataset does not represent 100% of all posts that possess the keyword, "Pepsi." Rather, Twitter provides samples based on search queries. Queries most likely have access to less than 10 percent of Twitter's total data archive. Furthermore, Twitter's API data distribution processes are considered proprietary and are undisclosed. This research also includes temporal network analysis. It uses timestamps for posts as NodeXL derived them from the Twitter API. These time stamps may conflict with other reports concerning various Twitter posts involved in the Moments Anthem's release. This is because as Twitter users access posts in real-time, time stamps reflect their specific time zone.

Upon first examining the data, it was clear that the network grew rapidly over a short period upon the video's release on April 4. In particular, the network experienced a surge of growth on April 5. This growth is depicted in Figure 11.

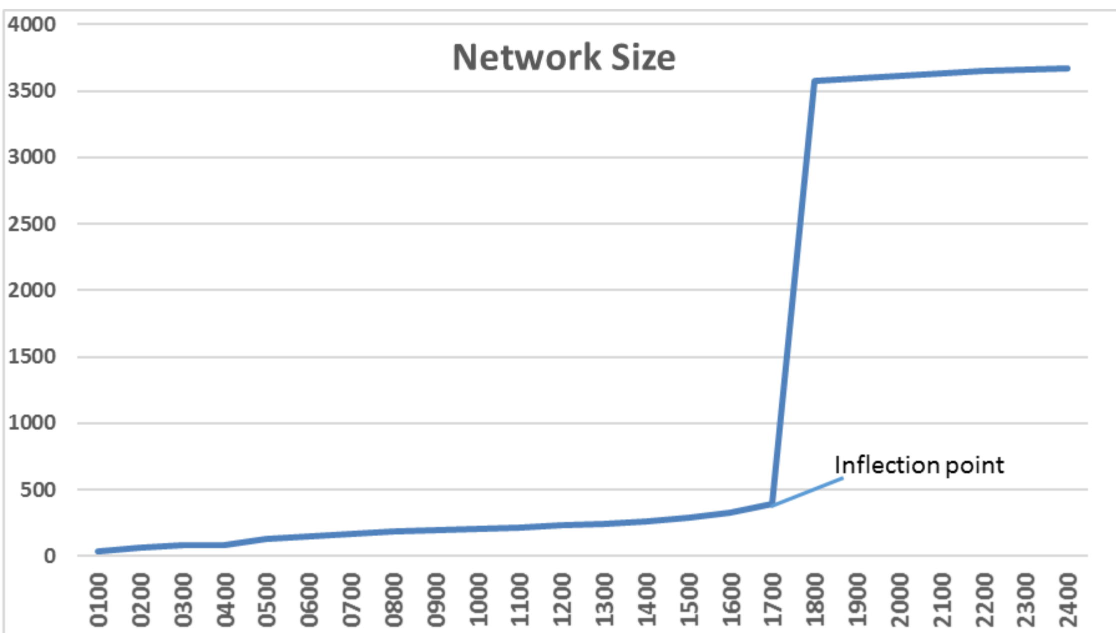


Figure 11. Pepsi Network Growth[208]

208 Adapted from Ceni, Arber, and Marc Smith. Pepsi Twitter Data-set from NodeXL. Raw data. NodeXL, California.

Figure 11 illuminates a rapid increase in the network's size between 1700 and 1800—an 804.5% change. Figures 12 and 13 illustrate Pepsi's network at 1700 and at 1800.

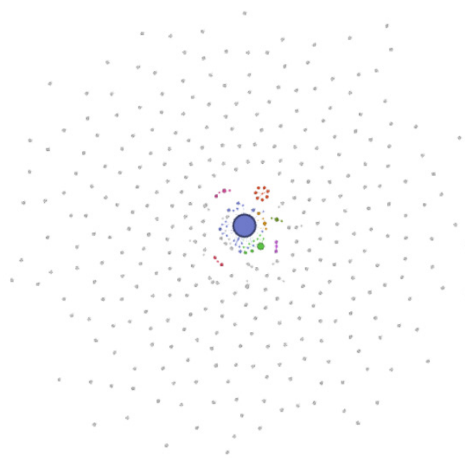


Figure 12. Pepsi's Network at 1700

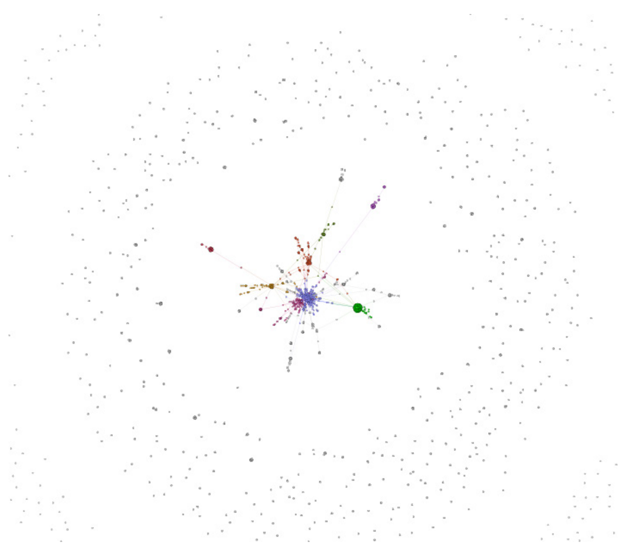


Figure 13. Pepsi's Network at 1800[209]

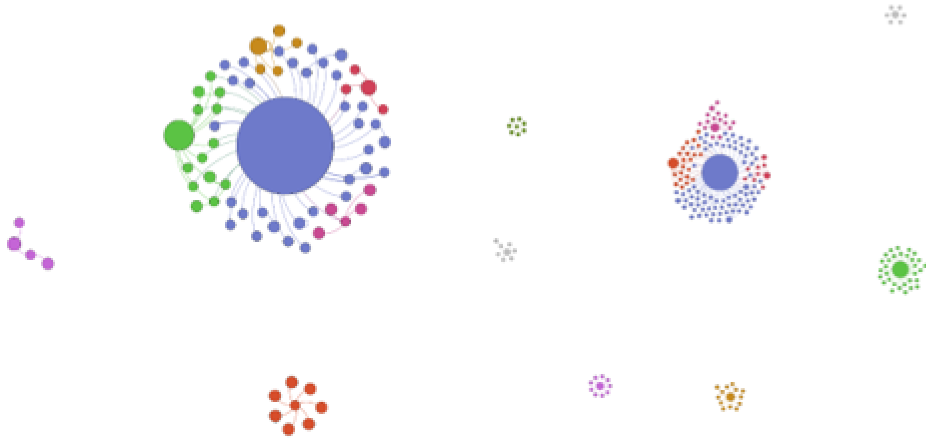
Furthermore, the data indicate the majority of the network's growth occurred during a one-minute period; between 17:42 and 17:43 the network grew by 456%. To further

209 Adapted from Ceni, Arber, and Marc Smith. Pepsi Twitter Data-set from NodeXL. Raw data. NodeXL, California.

examine this phenomenon, major components were extracted from the network and examined at ten-second intervals during this minute-long period. This is seen in the sociograms in Figure 14. Also, Figures 15 and 16 show the evolution of the network's major components on 08 APR. The in-degree centrality of the top 15 nodes within each network are also listed below each image. Component colors are indicated in Figure 14.

Component including @Phil_lewis and _zeets	
Component including Pepsi	
Component including Bernice King	
Component including *Time*	
Component including *NY Times*	
Component including *Reuters*, and *Buzzfeed*	

Figure 14. Component color key

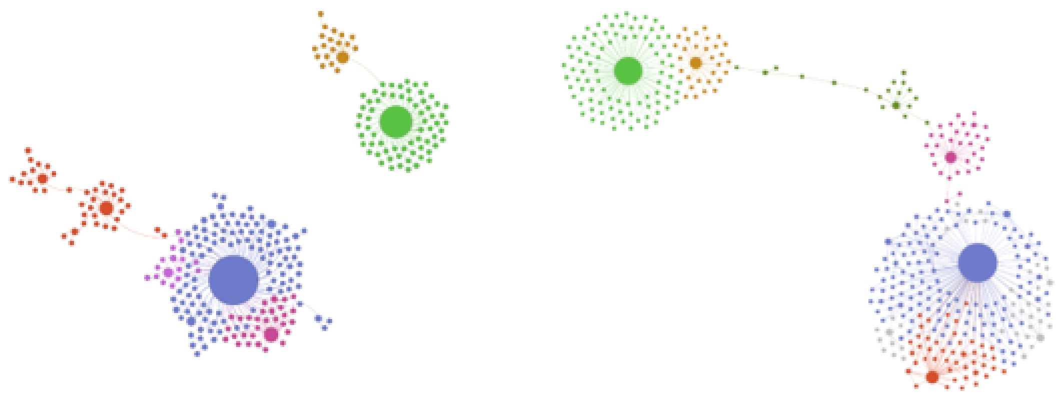


Label	indegree
pepsi	48
kendalljenner	11
oliviamesser	4
cocacola	3
rosariodawson	2
danscavino	1
chembros	1
amazon	1
wispmedia	1
justmy_namehe	1
youtube	1
missyjom	1
variety	1
yrsvalerie	1

Label	indegree
pepsi	82
berniceking	32
kendalljenner	17
phil_lewis_	12
_zeets	12
nytimes	10
iamroemello4	7
cocacola	7
ignant_	7
_tarynitup	6
yeahitswilly	4
byryanbrooks	3
kindakuls	3
veldoncoburn	3
persiflagenuine	2

Figure 15. Pepsi Network on 05 APR 17:42:00 (left) and 17:42:10 (right)[210]

[210] Adapted from Ceni, Arber, and Marc Smith. Pepsi Twitter Data-Set from NodeXL. Raw data. NodeXL, California.

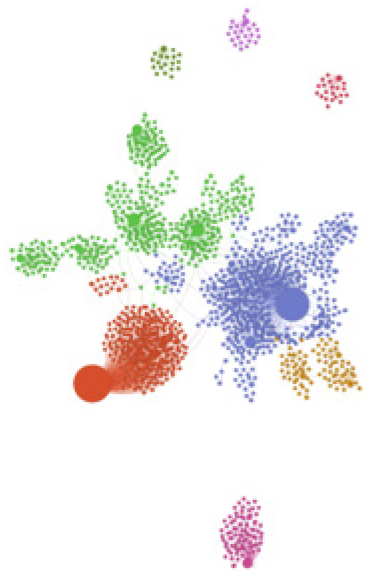


Label	indegree
pepsi	112
berniceking	68
kendalljenner	24
_zeets	22
phil_lewis_	17
ignant_	12
cocacola	11
_tarynitup	9
yeahitswilly	8
thedailybeast	4
nydailynews	4
veldoncoburn	4
deray	4
byryanbrooks	4

Label	pr_indegree
pepsi	134
berniceking	91
kendalljenner	33
phil_lewis_	30
_zeets	28
cocacola	12
ignant_	12
yeahitswilly	11
_tarynitup	9
oliviamesser	8
variety	4
ethan_andertor	4
kindakuls	4
nydailynews	4

Figure 16. Pepsi Network on 05 APR 17:42:20 (left) and 17:42:30 (right)[211]

[211] Adapted from Ceni, Arber, and Marc Smith. Pepsi Twitter Data-Set from NodeXL. Raw data. NodeXL, California.



Label	indegree
pepsi	718
berniceking	586
tinatbh	236
wandaswidow	218
kendalljenner	158
habpria	153
cocacola	134
phil_lewis_	134
chenyboi	120
iamroemello4	119
_zeets	119
starbucks	101
h3h3productior	98
thecut	82
komptonmusic	69

Figure 17. Pepsi Network on 05 APR 17:42:60[212]

The topography of the network during this minute-long span takes on an interesting transformation. In the first interval, Pepsi is central to the network, and there are few significant nodes surrounding the company. As time progresses, new nodes appear, each

[212] Adapted from Ceni, Arber, and Marc Smith. Pepsi Twitter Data-Set from NodeXL. Raw data. NodeXL, California.

acquiring a considerable following and becoming central to their own components seen in Figure 16. These components eventually become loosely tied to each other and seem to surround the Pepsi node. Ultimately, it appears that the growth within the network occurs around key influencers. While it is unclear as to whether these influencers shifted the general population's opinions, latter sociograms indicate their role in amplifying the controversy.

Bernice King, youngest daughter of Martin Luther and Coretta Scott King, is an example of this dynamic. She is the Chief Executive Officer of the Martin Luther King Jr. Center for Nonviolent Social Change in Atlanta, Georgia and is a prominent social rights advocate.[213] The day after the "Live for Now" Anthem first aired, she commented on the advertisement by stating, "If only Daddy would have known about the power of #Pepsi."[214] The tweet is displayed in Figure 17.

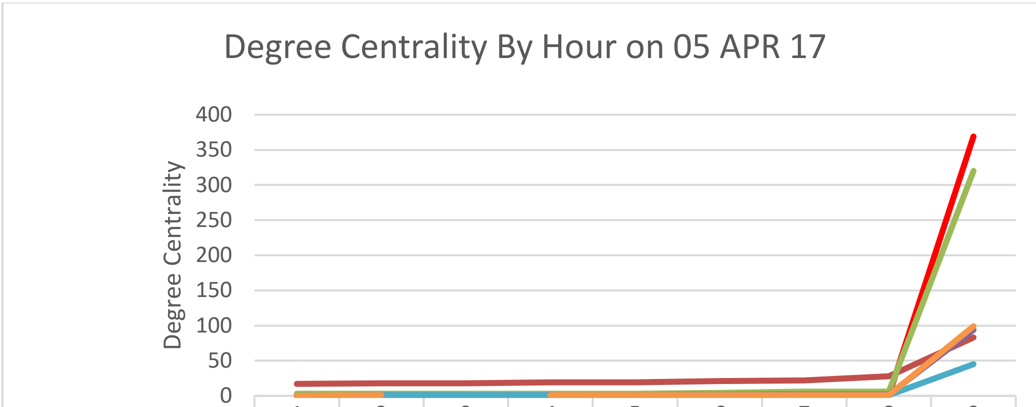
213 "Bernice King Biography," Biography.com, accessed August 28, 2018, https://www.biography.com/people/bernice-king.

214 Be A King (@BerniceKing), "If only Daddy would have Known about the Power of #Pepsi," Twitter, April 5, 2017, https://twitter.com/berniceking/status/849656699464056832?lang=en.

Figure 18. Tweet by Bernice King after Pepsi Anthem Aired[215]

After her Twitter post, her in-degree centrality increased significantly in the following hours as displayed in Figure 18.

[215] Source: Be A King.



	1	2	3	4	5	6	7	8	9
Bernice King	0	0	0	0	0	0	0	1	369
Pepsi	17	18	18	19	19	21	22	28	83
Kendal Jenner	3	3	3	3	3	4	6	6	320
Phil Lewis	0.0049	1	1	1	1	2	2	2	94
Ignant	0.0049	1	1	1	1	2	1	1	45
_zeets	0.0049	1		1	1	1	1	1	99

Figure 19. Twitter Influencers' In-degree Centrality[216]

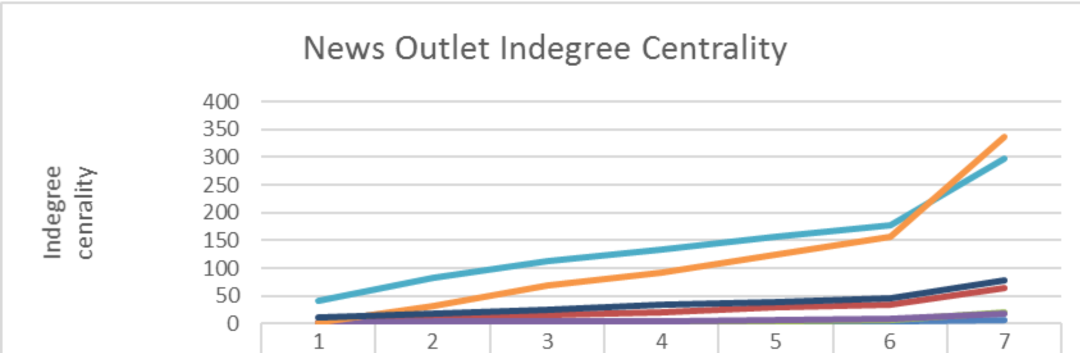
Figure 18 displays Bernice King, Pepsi, Kendall Jenner, as well as other prominent influencers within the network including Twitter handles Phil Lewis, Ignant and _zeets. The chart tracks each node's in-degree centrality over a period of 9 hours. During the first hours, all nodes experience a slight and gradual increase in centrality. However, at hour eight—between 1700 and 1800, in-degree centralities spike considerably. Correlated with this influx is King's entrance into the network with her famous Twitter post. The data suggests her post appears at 1615; consequently, King and the other nodes' centralities spike significantly. This provides evidence indicating that Bernice King's post helped boost the intensity of the controversy.

Furthermore, Pepsi's formal apology on Twitter may have helped catalyze the network's rapid expansion as well.

The data shows the interaction took place between 17:42 and 17:52—the same ten-minute period that contained the majority of the network's expansion. The message received

216 Adapted from Ceni, Arber, and Marc Smith. Pepsi Twitter Data-Set from NodeXL. Raw data. NodeXL, California.

significant attention and press coverage. This is correlated with a spike in news outlets' centrality during this time as well as seen in Figure 20.



	1	2	3	4	5	6	7
Daily Beast	2	3	4	4	4	4	6
NY Times	1	10	15	20	29	34	63
NY Daily News	0	1	4	4	5	6	21
Reuters	1	4	5	5	6	8	17
Pepsi	42	82	112	134	156	177	297
Bernice King	2	32	68	91	124	156	336
Kendall Jenner	11	17	24	33	39	45	77

Figure 20. Table Showing increase in News Outlet In-degree Centrality[217]

The dynamics within this network brings forth several observations. First, Kendall Jenner maintained her position as one of the most central actors within the network—even during the advertisement's initial stages. This indicates that within a less inflammatory context, Jenner may have been an excellent choice as a celebrity advocate. In this case, it seems that Pepsi's pairing between environmental context and its primary influencer was flawed.

Secondly, Pepsi did not forecast the effects of other actors within the network. From the above analysis once can conclude there is merit to Brad Jakeman's assessment that individual actors within the network have the ability to significantly affect a brand. Pepsi ultimately experienced disruption within their consumer network. This disruption was not

[217] Adapted from Ceni, Arber, and Marc Smith. Pepsi Twitter Data-Set from NodeXL. Raw data. NodeXL, California.

physical in nature. Rather, the disruption was conceptual and stemmed from opposing actors' amplification of negative sentiment. Ultimately Pepsi's "Live for Now - Moments Anthem" scandal represents a mismatch between influencer, content, and environmental context.

Third, the video had negative appeal upon its first release, which in some respects contradicts Jakeman's argument. To support this assessment, sentiment analysis was conducted on the network on 04APR—a period well before the Pepsi networks expansion on 05APR. Figure 21 shows the number of positive, negative ties within the network. Of the 104 ties within the network, 79.81% represent negative sentiment toward the commercial. This provides evidence that while influential actors certainly amplified the negative effects of the video, they did not effectively convince the general population to move against Pepsi.

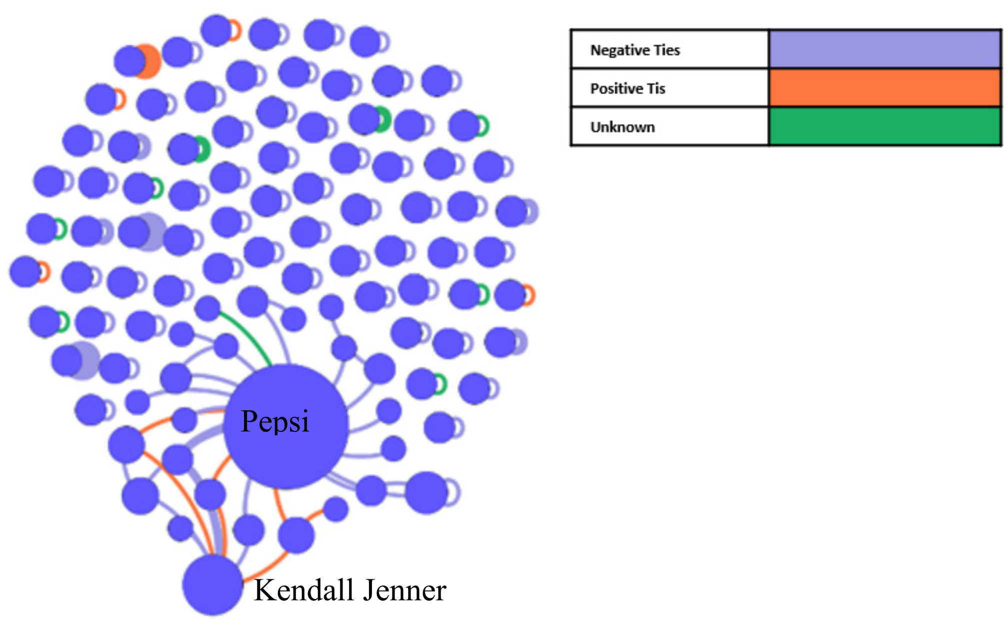


Figure 21. Pepsi Network Sentiment Described Using Network Ties[218]

[218] Adapted from Ceni, Arber, and Marc Smith. Pepsi Twitter Data-set from NodeXL. Raw data. NodeXL, California.

The news may have played a part in amplifying the effects of the video. For instance, many major news outlet in the U.S. aired stories about the ad's negative reception as early as April 4.[219] This is interesting because the surge in negative feedback had not yet begun.

C. CASE IV: COCA-COLA'S "THAT'S GOLD"

Coca-Cola represents Pepsi's counterpoint within the marketing community; thus, it makes sense to explore how the company leverages social networks. This section examines how Coca-Cola leverages social networks as part of its internal marketing strategy and during its marketing campaigns. Coca-Cola's 2016 Rio Olympics campaign "That's Gold" is used as an illustration. This section first provides a brief description of "That's Gold." Second, it explores Coca-Cola's internal marketing strategy and its structure through the lens of social networks. It then deconstructs network-centric components of the "That's Gold" campaign and then applies social network analysis to describe these components in further detail.

1. Coca-Cola: "That's Gold" Overview

Coca-Cola has been an official Olympic Sponsor since 1928,[220] as this venue provides the company with significant exposure and facilitates its ability to increase its market share of the soft drink industry.[221] Coca-Cola thus develops specific marketing campaigns for both the winter and summer Olympics. For the Rio Olympics, Coca-Cola created the "That's Gold" campaign. Within this initiative, the company sought to capitalize on "gold moments," as Rodolfo Echeverria, vice president of Global Creative of the Coca-Cola Company explains:

> For Coca-Cola, gold moments are made of special feelings—joyful, refreshing, sharable—all of those moments that make you feel gold, just

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[219] This is revealed using a Google news search between April 3 and April 6.

[220] "The Coca-Cola Company Maintains the Longest Continuous Relationship with the Olympic Movement," Olympic Committee, accessed August 28, 2018, https://www.olympic.org/sponsors/coca-cola.

[221] Kim Inglis, "Olympic Games Marketing to Benefit Brands, Savvy Investors," *Financial Post*, August 1, 2012, https://financialpost.com/personal-finance/investment-opportunity-of-olympic-proportions.

like the feeling of drinking an ice-cold Coca-Cola. We look forward to bringing #ThatsGold to life in Rio de Janeiro and around the world."[222]

Coca-Cola's goal was to bridge the excitement of Olympic competition with positive moments that occur throughout day-to-day life; that every person can experience a "gold moment.'[223] This concept is certainly in line with the brand's overarching marketing philosophy. While Pepsi focuses on linking its brand to excitement and pop culture, often through celebrity endorsements, Coca-Cola primarily leverages emotional branding. Lucy Gevorgyan explains that it capitalizes on embedding itself within family values, community spirt, and positive emotions. The company orients toward building a more intimate connection to its target audiences than its rivals.[224] This characteristic is exemplified by Coca-Cola's ability to link itself to the "Family Christmas." In this situation, consumers link the brand to Santa Clause and Polar Bears. Both are indicative of winter and family togetherness.[225]

The "That's Gold" Campaign implemented this central paradigm. To capture these "Gold moments', Coca-Cola built an environment around the Olympics suitable for cultivating emotional stories able to be connected to the brand. For instance, the Coca-Cola explained that it developed and disseminated TV commercials highlighting inspirational moments from Olympic history. Furthermore, the company sponsored the customary Olympic torch relay, a 36,000-km march that transported the official Olympic torch throughout many South American cities. As the sponsor, Coca-Cola was able to capture and amplify key moments throughout the relay.[226] During the Olympic Games, the

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[222] "Coca-Cola Goes for Gold in Rio 2016 Olympic Games with Global #ThatsGold Campaign," Coca-Cola, accessed September 23, 2018, https://www.coca-colacompany.com/press-center/press-releases/coca-cola-goes-for-gold-in-rio-2016-olympic-games-with-global-thatsgold-campaign.

[223] Coca-Cola.

[224] Lucy Gevorgyan, "Marketing Strategies of Coca Cola and Pepsi: Which One Is Better?," *Medium*, April 24, 2018, https://medium.com/@lucygevorgyan12/marketing-strategies-of-coca-cola-and-pepsi-which-one-is-better-34ab13f60e9b.

[225] "The True History of the Modern Day Santa Claus," Coca-Cola, accessed September 24, 2018, https://www.coca-colacompany.com/stories/coke-lore-santa-claus.

[226] "Behind the Scenes of the Rio 2016 Olympic Torch Relay," Coca-Cola, July 18, 2016, https://www.coca-cola.co.uk/stories/behind-the-scenes-of-the-rio-2016-olympic-torch-relay.

company setup the Coca-Cola Olympic station—a center meant to be a social hotspot that allowed teenagers to meet Olympic athletes.[227] Pepsi also leveraged a cadre of "influencers" to drive conversation about the brand. This included Olympic athletes and social figures that identified with teenage population segments.[228] Finally, the campaign leveraged a social media site called @oursooficial. This site allowed customers to post feel-good moments within messaging themes set by Coca-Cola.[229]

Pepsi measured the campaign's effectiveness by measuring user sentiment associated with the brand's messaging. This sentiment was compared to Coca-Cola's share of the soft drink market throughout the Olympics. Marketing executives estimated that they increased their share by 1.5% due the "That's Gold" campaign.[230]

2. Social Networks Internal Social Network Strategy

"That's Gold" was implemented in the wake of a strategic and organizational shift within Coca-Cola's marketing framework. Ultimately, Coca-Cola sought to adapt its messaging programs to the rapidly evolving information environment in 2011. Jonathan Mildenhall explains that with the advent of social media, there has been a marked distribution of creativity within the information environment. He states, "no one has the smarts on ideas. Customer generated stories outnumber Coca-Cola generated stories on most of our brands."[231] Within the latter passage, Mildenhall is explaining the phenomenon of user-generated content. The preeminence of smartphones and social media

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[227] "Coca-Cola Launches #ThatsGold Campaign Ahead of Olympics," *Retail World Magazine*, July 29, 2016, https://www.retailworldmagazine.com.au/coca-cola-launches-thatsgold-campaign-ahead-olympics/.

[228] Jouney NZ Staff, "#ThatsGold: Get the Scoop on Coke's Global Campaign for Rio 2016 Olympic Games," The Coca-Cola Company, accessed October 1, 2018, https://www.coca-colajourney.co.nz/stories/thatsgold-get-the-scoop-on-coke-s-global-campaign-for-the-rio-2016-olympic-games.

[229] Liffreing 2016.

[230] WARC, "Coke Tracks Impact of Brand 'Feelings,'" accessed September 25, 2018, https://www.warc.com/NewsAndOpinion/news/N38163_Coke_tracks_impact_of_brand_feelings/502e5244-34be-4589-a17d-b1de60414818.

[231] Jonathan Mildenhall, "2020 Vision: A Marketing Perspective with Jonathan Mildenhall," YouTube video, posted by freetvaust, May 17, 2012, https://www.youtube.com/watch?v=kt3m4GeNkpE.

allow users to publish stories at a very high rate. This also has increased consumer empowerment. In a Think TV interview, Mildenhall reflects upon the information environment's rapidly changing nature.

> When I started here at the Coca-Cola Company just five years ago, I would be successful if I was given, you know, a pretty substantial budget to produce a sixty-second TV ad. Now, if I'm given a budget, I better come back with minutes and minutes of film content that approaches whatever story we're trying to tell from a slightly different perspective…I think what's happening is not that TV is losing its primacy, but the way that we use TV is evolving because of the number of media that surround TV.[232]

These observations appeared to prompt the company to develop a new marketing strategy called "liquid and linked" as described in Coca-Cola's "Content 2020" strategy. The new strategy tilted the company toward harnessing the massive amount of content already within the information environment, rather than unilaterally creating brand-centric advertisements and disseminating to a target audience in a traditional fashion. Coca-Cola explained that the basic principle of "liquid and linked" is to introduce captivating ideas that will spread and grow in a viral fashion throughout the target audience. These ideas—capable of transferring between people and media platforms are called "liquid." These viral concepts must then be, in some way, connected back to the brand's core values; hence their term "linked.'[233] The entire concept is based on introducing content that people will share physically and digitally. Mildenhall explains:

> We want to create ideas that are so contagious we actually lose control of where they go…we want to inspire conversation that goes into places we couldn't even imagine. We moved away from old-fashioned brand propositions and created bigger brand spaces…we don't want to tell people a story but give people a story to tell. Coming out of real tangible human experiences, these consumer stories are far more authentic.[234]

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232 Mildenhall.

233 "Coca-Cola Content 2020 Initiative Strategy Video - Parts I & II," YouTube video, posted by forwardmarketingtv, July 7, 2012, https://www.youtube.com/watch?v=G1P3r2EsAos.

234 Joeri van den Bergh and Mattias Behrer, *How Cool Brands Stay Hot: Branding to Generations Y and Z* (London: Kogan Page, 2016), 206.

The key to Liquid and Linked is creating content that drives consumer discussion. This discussion—user-created content, is then harnessed and guided by Coca-Cola.[235]

In order to achieve this vision, Coca-Cola seemed to modify components of its marketing structure. For instance, Shultz notes that in 2015, Coca-Cola conducted a full agency review to support their upcoming global campaign, which included “That’s Gold.”[236] Agency reviews are typically done to challenge a company’s incumbent agency set up. Within these reviews, the supported company allows competing agencies to pitch new marketing strategies.[237]

Coca-Cola’s marketing structure before the review revolved around a group called Starcom MediaVest (SMV), which was recently renamed to Spark Foundry. Spark Foundry is an agency network within a holding company called Publicis.[238] The Publicis—Spark Foundry structure resembles Omnicom. In 2015, Publicis was a holding company comparable in size to Omnicom, and Spark Foundry was one of its six major agency networks. The super agency now manages four networks.[239] Coca-Cola’s reassessment of its marketing system was part of a widespread agency review movement commonly nicknamed “review-ageddon.” Within the movement, many Fortune 500 companies reassessed their marketing strategies, causing major conflict between competing agencies as they attempted to defend their positions.[240] Analysts assessed that these major businesses “might finally be waking up to new consumer media trends and are exploring

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235 freetvaust, “2020 Vision,” 2:37.

236 “Coca-Cola Puts Media Into Agency Review | Agency News - Ad Age,” accessed November 9, 2018, https://adage.com/article/agency-news/coca-cola-puts-media-agency-review/298185/.

237 Lara O’Reilly, “$25 Billion in Media Money Just Went up for Grabs — and Nobody Can Agree on Why,” Business Insider, accessed September 26, 2018, https://www.businessinsider.com/the-unprecedented-trend-of-media-agency-reviews-in-2015-2015-5.

238 Erik Oster, “Publicist Retires Mediavest Name after 18 Years, as Agency Rebrands as Spark Foundry,” Ad Week, July 7, 2017, https://www.adweek.com/agencies/publicis-media-retires-mediavest-name-after-18-years-as-the-agency-rebrands-as-spark-foundry/.

239 Katie Richards|March 9 and 2016, “Publicis Groupe Consolidates Its Media Agencies Into 4 Global Brands,” accessed November 12, 2018, https://www.adweek.com/brand-marketing/publicis-groupe-consolidates-its-media-agencies-4-global-brands-170080/.

240 Tom Huddleston, “With Billions at Stake, Here’s Why Ad Agencies Are Bracing for Battle,” *Fortune*, July 2, 2015, http://fortune.com/2015/07/02/advertising-industry-account-reviews/.

whether the agency that helped them spend hundreds of millions of dollars on TV each year has the same expertise to help them shift tens of millions of dollars of their budgets over to online video."[241] Ultimately "Review-agedon" marked a significant transition in corporate marketing systems to adapt to the information environment's changing nature.

Coca-Cola was no exception to this trend. Shultz explains that in August 2015, the company released the review's findings. Coca-Cola voiced its intent to implement what they called a "networked agency approach."[242] Within this approach, Coca-Cola aligned agencies in a manner that maximize the company's ability to leverage creative talent. Within the new model individual creative talent is pooled between multiple agencies to support one specific Coca-Cola campaign. The new structure was based on a model similar to Omnicom and Interpublic's "common wealth" joint venture to support Chevrolet in 2012.[243] In this case, two ad agencies assembled a joint 8-person "global advisory board" that assisted in pooling resources and talent for Chevrolet's advertisements.[244] Coca-Cola's new set up is also strikingly similar to Pepsi's Galaxy model described earlier in the chapter. Both systems leverage a central platform to draw individual talent from multiple agencies.

Coca-Cola's networked agency model centers on three agencies: Ogilvy, Sra. Rushmore, and Santo of Buenos Aires. Seven other major agencies were incorporated as well.[245] This type of development is representative of a recent industry trend in which companies make use of agency networks to cultivate the skills and expertise necessary to

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241 Lara O'Reilly, "$25 Billion in Media Money Just Went up for Grabs—and Nobody Can Agree on Why," Business Insider, May 29, 2015, https://www.businessinsider.com/the-unprecedented-trend-of-media-agency-reviews-in-2015-2015-5.

242 E. J. Shultz, "WPP Is Big Winner in Coke's Global Creative Review," *Ad Age*, August 13, 2015, https://adage.com/article/agency-news/wpp-big-winner-coke-s-global-creative-review/299962/.

243 Seb Joseph, "Coca-Cola Picks WPP to Make Brand Pop with New Global Campaign," The Drum, August 14, 2015, http://www.thedrum.com/news/2015/08/14/coca-cola-picks-wpp-make-brand-pop-new-global-campaign.

244 Steve McClellen, "Global Drive: Omnicom, McCann Jointly Win Major Chevrolet Account," *Media Daily News*, March 27, 2012, https://www.mediapost.com/publications/article/171207/global-drive-omnicom-mccann-jointly-win-major-ch.html.

245 E.J. Shultz, 2015

message in complex information environments. An Institute of Practitioners in Advertising (IPA) study recently concluded that agencies and businesses are projected to form expertise-based collaborative networks due to highly technical communications demands:

> From agency network to the networked agency, agencies will now use networks to drive their reach in skills and capabilities, not just geographical reach. In a move towards the ways of the digital world, agencies are starting to look to more flexible, scalable networks to create an ecosystem of talent, technologies, and tools. This presents a commercial opportunity as strategic alliances and partnerships offer new ways to create and capture value.[246]

Coca-Cola's Jonathan Mildenhall shed more light on this concept during a MediaPost interview. He states:

> Traditional agencies are brilliant at coming up with long-term sustaining creative ideas. They come up with entertainment platforms. The digital agencies know how to come up with short-term buzz, get everybody talking about a brand overnight, but then not necessarily managing those ideas in the long term. So we really have to focus on the integration of the traditional agencies and the digital agencies, and the technology companies to make sure our ideas live the longest span possible and appeal to the widest numbers.[247]

In the latter passage, Mildenhall's observations seem to support IPA's findings about the networked evolution of ad agencies. In Coca-Cola's case, the brand seems to be developing and synchronizing an attributional network that is capable of operating in a rapidly evolving information environment.

Coca-Cola expanded this networked model outside of the agency structure. *Adweek* indicated that "Coca Cola [sic] no longer relies on traditional ad agencies for creative ideas." Coca-Cola views agencies as only one component of the brand's creative drive. Creative content will be a collaborative effort between Coca-Cola's agency network, and non-standard sources of creativity. This structure must ultimately must harness "liquid content."

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[246] "IPA's New Future of Agencies Report Reveals Opportunities for Agencies to Combat Commoditisation," IPA, accessed September 26, 2018, http://www.ipa.co.uk/news/new-ipa-future-of-agencies-report-reveals-opportunities-for-agencies-to-combat-commoditisation#.W6sAM2hKiUk.

[247] Mark Walsh, "Q&A: Mildenhall On Coke's 'Liquid' Marketing," October 5, 2011, MediaPost, https://www.mediapost.com/publications/article/159922/qa-mildenhall-on-cokes-liquid-marketing.html.

> The fluidity of our ideas [liquid content] means that no one model of development can do it all. We need more collaborative, adaptive, and continuous models of [content] development. We are working with several different models right now, from working directly with creative talent to working with brand fans to working with new creative industry collaborators to working with a "rockstar" single agency across all of our particular needs.[248]

Mildenhall indicates that to accomplish this, Coca-Cola must "inspire participation among the very best and "connect these creative minds."[249] Mildenhall is describing the implementation of a system that connects and synchronizes the latter models for one common goal. The creative network no longer consists of just advertising agencies. It also involves any individual, institution, or organization capable of creating Coke-centric content.

Ultimately, this new strategy rests upon a marketing system that facilitates the multi-channel dissemination of idea-centric, compelling content that stimulates active participation within the target audience. The system must also guide and amplify these consumer conversations in a way that supports marketing goals.

How does Coca-Cola drive and capitalize on these conversations? The answer, in part, seems to reside in the brand's ability to leverage networks close-to or within its target audiences. A relatively new concept called "influencer marketing" is one technique that Coca-Cola uses to drive conversation and amplify relevant content.[250] Steven Woods explains that this technique is a form of marketing "where the focus is placed on specific individuals rather than a target market as a whole. It identifies the individuals that have influence over potential buyers, and orients marketing activities around these influencers."[251] This type of marketing is similar to celebrity advocacy campaigns like

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[248] forwardmarketingtv, "Coca-Cola Content 2020," 8:32.

[249] forwardmarketingtv, 9:24.

[250] "How Coca-Cola Identifies and Engages Influencers | Traackr," accessed April 30, 2018, http://www.traackr.com/blog/coca-cola-identifies-and-engages-influencers.

[251] Steven Woods, "#Sponsored: The Emergence of Influencer Marketing" (thesis, University of Tennessee, Knoxville, 2016), 5.

Pepsi's "Live for Now," featuring Kendall Jenner in that they both leverage individuals. However, influencer marketing is far more nuanced. The strategy is tailored to identify and leverage individuals that have a more intimate and trusting relationship with certain groups, rather than leverage a celebrity's wide reach.[252] The concept is derived from Word of Mouth Marketing, in which individuals tend to make consumer decisions based on the insights of those within their immediate social networks.

> People trust other people they know. They assume (usually correctly) that their neighbor or colleague wishes them well and has no interest in providing false, misleading, or incomplete information. They're just passing on a good tip. These could be friends, family, experts or trusted figures within a community.[253]

Influencer marketing is not unique to Coca-Cola. Since 2012, influencer marketing has observed significant industry-wide growth. Within corporate budgets, the strategy has progressed significantly. For instance, "A large majority of advertisers are investing in influencers. Schlesinger Associates for Augure found that 84% of marketing and communications professionals worldwide expect to launch at least one campaign involving an influencer in the next 12 months."[254]

Coca-Cola's influencer marketing programs focus on identifying and leveraging these influencers that could support the brand's objectives. The advent of social media provided Coca-Cola with data to find influencers quickly and iteratively enough to be integrated into the standard marketing systems within Liquid and Linked. For instance, PR Newswire notes that Coca-Cola chartered a technology company called Traackr, which powers the brand's influencer marketing program.[255] Traackr also supports other large businesses such as Microsoft, L'Oréal, SAP, Travelocity, and Honda. Traackr is a

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252 Steven Woods, "#Sponsored: The Emergence of Influencer Marketing," n.d., 15.

253 Duncan Brown and Nick Hayes, *Influencer Marketing: Who Really Influences Your Customers?* (New York: Routledge, 2008), 184.

254 Woods, "#Sponsored," 7.

255 "Traackr Raises $9m in Serious B Funding to Fuel Influencer Marketing Technology for Global Brands," PR Newswire, April 26, 2018, https://www.prnewswire.com/news-releases/traackr-raises-9m-in-series-b-funding-to-fuel-influencer-marketing-technology-for-global-brands-680931501.html.

"dashboard" of tools that searches and analyzes the API data streams connected to major social media sites like Twitter, Facebook, and Instagram.[256] Traackr is also partnered with another technology company called Demographics Pro, which specializes in collecting and organizing demographic data from across social media platforms.[257] Examples of these data are marital status, nationality, income, and preferred locations to shop and eat.[258] The Traackr dashboard uses big data to assist marketing execs in identifying and vetting potential influencers. This includes social network analysis. Within the dashboard, Traackr built a social network analysis tool that allows marketers to identify users that are central to target audiences of interest. It also allows analysts to assess which groups these individuals influence.[259] Demographic data then enables analysts to identify key attributes about the network. Figure 22 is an example of the network analysis software implemented in Traackr.

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[256] Sam Cookney, "Getting Started with Traackr," Traackr, accessed September 27, 2018, http://help.traackr.com/quick-start-guide/getting-started-with-traackr.

[257] "Influencer Marketing: 5 Questions with Traackr's Kirk Crenshaw," *Brandchannel* (blog), October 26, 2017, https://www.brandchannel.com/2017/10/26/influencer-marketing-5-questions-traackr-kirk-crenshaw/.

[258] "About Demographics Pro," Demographics Pro, accessed September 27, 2018, https://www.demographicspro.com/views/demographics_aboutdemo.shtml.

[259] "Introducing Traackr's Influencer Network Analysis," accessed November 19, 2018, http://www.traackr.com/blog/introducing-traackrs-influencer-network-analysis-ina.

Figure 22. Network Analysis within the Traackr Dashboard[260]

Traackr ultimately allows Coca-Cola marketers to search for, identify, and monitor influencers on social media.

Once potential influencers are identified, Coca-Cola's next task is to connect with and leverage these influencers. While the company has not released a detailed description of their influencer techniques, Traackr provides guidance concerning how influencers should be engaged and integrated into a company's marketing plans.

Traackr advocates "always on" influencer programs, which encompass the gradual development of a meaningful and ongoing relationship between the business and influencer.[261] This contrasts with "tactical programs" that leverage influencers for key events and then discard their service.[262] Within the influencer process, Traackr describes a "ladder of engagement" in which the influencer and company pass through several

[260] Source: Delphine Reynaud, "How Traackr Maarkting Uses Traackr for Influencer Marketing," Traackr, March 9, 2015, http://www.traackr.com/blog/traackr-influencer-marketing.

[261] Simon Trigg, "Assemble Your Own Avengers to Win the Influencer Marketing Infinity War," Traackr, accessed June 15, 2018, http://www.traackr.com/blog/assemble-your-own-avengers-to-win-the-influencer-marketing-infinity-war.

[262] Reynaud, "Traackr for Influencer Marketing."

progressive phases or "rungs": unaware, aware, interested, engaged, and advocate. Climbing the "ladder of engagement" represents the company's relationship journey, from asserting its presence to the influencer on social media, establishing rapport by tagging and commenting on the influencer's posts, and meeting with the influencer to discuss goals and collaboration, sponsoring the influencer's events, and eventually formalizing the relationship through ongoing collaboration and financial support.[263] When assessing this methodical process through the lens of relationships it seems to ensure that the brand and potential influencer are a good fit. The brand's goal is to build a mutually supportive relationship in which the influencer supports the brand within the context of daily life on a continuous basis. Because of this, the process may be time-consuming.

"That's Gold" was Coca-Cola's first major campaign that integrated its influencer program.[264] Within the campaign, Coca-Cola execs worked with key influencers to help them generate content that revolved around "That's Gold" themes. Kate Hartman, Director of Global Brand Public Relations explained: "What we're doing is giving them [influencers] 'That's Gold' and showing them what the program is all about and asking them to own it and to define what 'That's Gold' might be to their audiences."[265] The influencer strategy intended to catalyze and drive conversation concerning the campaign by encouraging their followers to post their own "gold" moments on social media.[266] That's Gold content was then captured and amplified by Coca-Cola's onsite "content newsroom"—a media center that continuously tracked and amplified Coke-centric conversations.[267] Stories were circulated on Coca-Cola's social media sites like

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[263] "Climbing the Ladder of Social Engagement with Influencers," Academy of Influencer Marketing, accessed September 27, 2018, http://education.traackr.com/courses/take/settingsail/texts/116074-the-ladder-of-engagement.

[264] Coca-Cola, "Coca-Cola Goes for the Gold on Social Media at Rio 2016," YouTube video, uploaded August 1, 2016, 2:09, https://www.youtube.com/watch?v=8En1pwACo-M&feature=youtube_gdata_player.

[265] Coca-Cola, "Coca-Cola Goes for the Gold on Social Media," 1:20.

[266] "#ThatsGold: Get the Scoop on Coke's Global Campaign for Rio 2016 Olympic Games," Coca-Cola Journey, April 8, 2016, https://www.coca-colajourney.co.nz/stories/thatsgold-get-the-scoop-on-coke-s-global-campaign-for-the-rio-2016-olympic-games.

[267] Coca-Cola, "Coca-Cola Goes for the Gold on Social Media," 0:38.

@oursooficial—an Instagram and Twitter handle that reposted Olympic experiences.[268] These supporting social media platforms ultimately helped foster a buzz about the brand's activities during the Olympics.

Coca-Cola worked with influencers it assessed to have the greatest level of authentic influence over teen audiences. In this case, the pursuit of authenticity did not necessarily include those individuals with the largest number of followers. Instead, Coke focused on working with those individuals that were highly engaged with the brand's target audiences. Delphine Reynaud explains that within their marketing strategy, Coca-Cola aims for what it calls the "magic middle…those people who are not paid bloggers and do not have large social followings but have strong engagement within their close community."[269]

"That's Gold" seemed to leverage the "magic middle" in that its influencers' followings were not as large as typical A-list celebrities. For instance, Social Blade indicates that Allie Evans, one of Coke's influencers, had 44,100 followers during the campaign.[270] While this following could be considered quite large to the average Twitter user, it is small compared to a widely known celebrity like Kendall Jenner who has 26.9 million followers.[271]

Coca-Cola's selection of influencers indicates an attempt to identify individuals who are more engaged with specific segments of its target audience. The selection process seems to parallel that of Traackr's guidance as it pertains to the "ladder of engagement"

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[268] Ilyse Liffreing, "How Coca-Cola Targeted Teens during the 2016 Olympic Games," Campaign Live, August 19, 2016, https://www.campaignlive.com/article/coca-cola-targeted-teens-during-2016-olympic-games/1406187.

[269] Delphine Reynaud, "How Coca-Cola Identifies and Engages Influencers," Traackr, September 30, 2015, http://www.traackr.com/blog/coca-cola-identifies-and-engages-influencers.

[270] Social Blade, "AllieMarieEvans Monthly Twitter Statistics (Social Blade Twitter Statistics) - SocialBlade.Com," accessed November 12, 2018, https://socialblade.com/twitter/user/alliemarieevans/monthly.

[271] Social Blade, "KendallJenner Twitter Stats Summary Profile (Social Blade Twitter Statistics) - SocialBlade.Com," accessed November 12, 2018, https://socialblade.com/twitter/user/kendalljenner.

and relationship building. Kate Hartman explained this during an interview posted on Entrepreneur.com.

> We started getting to know them [influencers for the "That's Gold" Campaign] before we actually started to have them do anything. We met with them each a few times. We treated them as a friend of the company. That pays off ten-fold," Hartman said. "It takes a lot of time to get to know who you are working with. They aren't an asset. They are a person.[272]

Hartman goes on to explain that this relationship building process began nearly two years before the Rio Olympics kicked off.[273]

3. "That's Gold" and Social Network Analysis

Coca-Cola's #ThatsGold Influencer program can be seen through social network analysis of Twitter posts in the lead up to and during the Olympics. Here, social network analysis reveals the extent to which influencers carried Coke-centric conversations, focused on the Olympics. NodeXL captured posts disseminated between July 1 and August 31, 2016. These posts contained the following keywords DietCoke, MyCokeRewards, Cokezone, CokeZero, CocaCola CocaColaCo, or WorldofCocaCola. This yielded 71,906 nodes and 103,267 edges. Edges represent Twitter posts, replies, and mentions. The data were collected from the Twitter Application Program Interface (API) using NodeXL's scraping function. The dataset does not represent 100% of all Twitter posts with the latter key words. Instead, Twitter provides samples based on search queries. Queries most likely have access to less than 10% of Twitter's total data. Furthermore, Twitter's data distribution processes through the API remains undisclosed. This particular NodeXL data set was collected by NodeXL administrators. Coke's network is displayed in Figure 23. Network Colors represent individual components. The large components within the sociogram form around official Coca-Cola Twitter accounts.

[272] Kristina Libby, "Coca-Cola, Dell and PayPal Share Their Influencer Marketing Secrets," Entrepreneur, June 22, 2017, https://www.entrepreneur.com/article/295634.

[273] Libby.

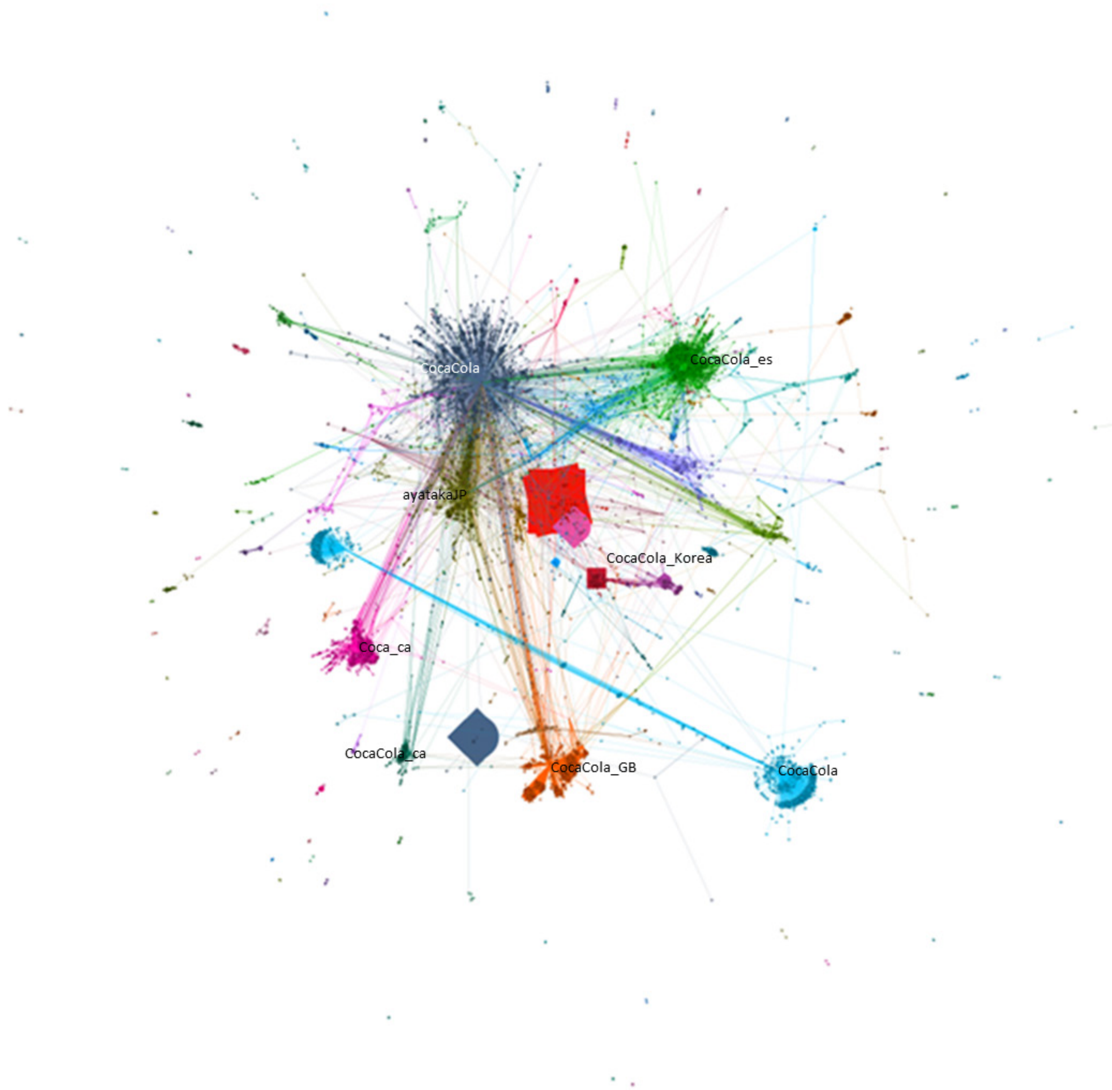

Figure 23. Coca-Cola Twitter Network July through Aug 2016[274]

274 Ceni, Arber, and Marc Smith. Coca-Cola Twitter Data-set from NodeXL. Raw data. NodeXL, California.

To simplify the network those posts that included terms Olympics, Olympinadas, Gold, OroEsOso, and Rio were extracted from the network. This extraction represents conversations that reflect both Coca-Cola and the Olympics. The network is displayed in Figure 24. It contains 8,516 nodes and 10,239 edges.

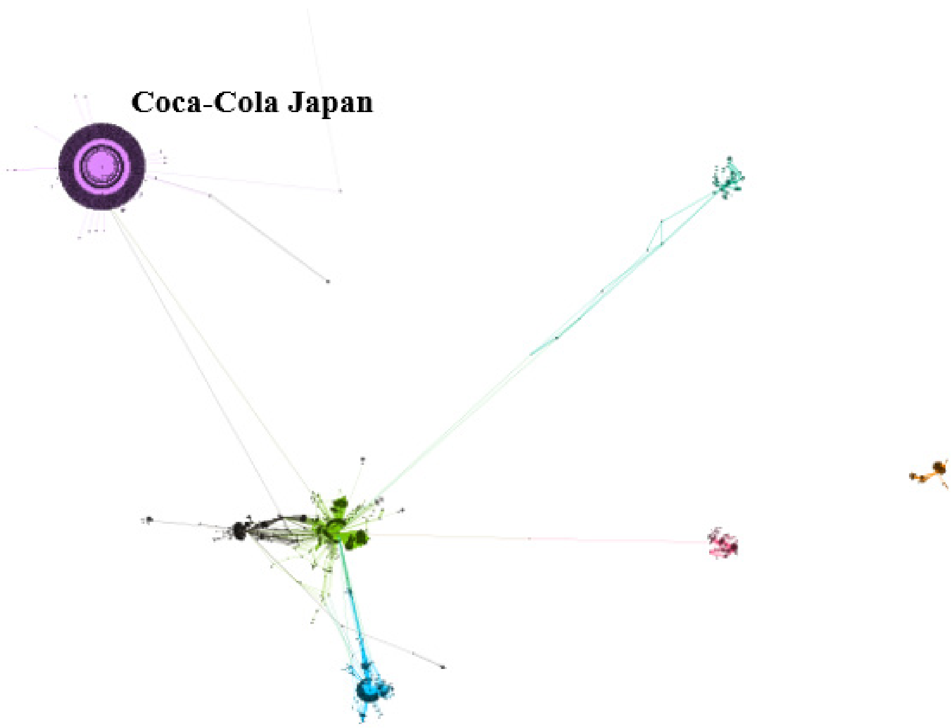

Figure 24. Coca-Cola Network Including Containing Olympics-Centric Terms[275]

275 Ceni, Arber, and Marc Smith. Coca-Cola Twitter Data-set from NodeXL. Raw data. NodeXL, California.

One curious characteristic of the graph is Coca-Cola Japan's presence within the network. Twitter account @Cocacolajpn possesses a significant number of ties and is disconnected from the rest of the network. Coca-Cola Japan's Ego Network accounts for approximately 58% of interactions within the network. Because of these dynamics, its position within the network seems to be an aberration. However, upon further research Coca-Cola Japan's predominance appears to stem from a unique marketing strategy unrelated to influencer marketing. In a press release Coke stated that Japan instituted a mobile app called Coke: ON, which allows Japanese consumers to pay for Coke products electronically. During the Olympics, Coca-Cola Japan offered coupons every time a Japanese athlete won a medal. These digital coupons were delivered in conjunction with Twitter reposts and connected to the mobile App.[276] This monetary incentivization may have boosted Coca-Cola Japan's Twitter handle. A close-up of Coca-Cola Japan's ego network is shown in Figure 25.

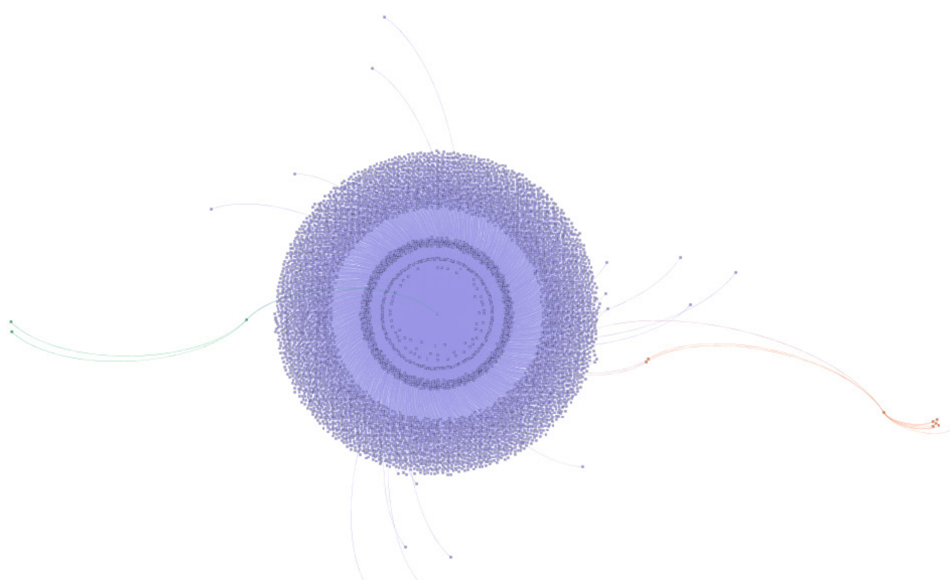

Figure 25. Coca-Cola Japan Ego Network

276 "Inside Coca-Cola Japan's Digital Marketing Journey," The Coca-Cola Company, accessed October 17, 2018, https://www.coca-colacompany.com/stories/inside-coca-cola-japans-digital-marketing-journey.

The high centrality ratings around Coca-Cola Japan's Twitter account indicate its strategy succeeded in developing a social media presence. However, it did not leverage social networks, so it is not within the scope of this paper. Because of this, the "That's Gold" campaign is assessed after removing Coca-Cola Japan from the network.

Outside of Coca-Cola Japan's position within the network, eleven of the brand's influencers can be observed. Table 3 displays influencers within the network who had an official connection to Coca-Cola.

Table 3. Coca-Cola's Influencers during the 2016 Rio Olympics[277]

Influencer	Influencer Description
Ashton Eaton	Olympic Athlete (89.6k followers)
Alex Morgan	Olympic Athlete (3.61m followers)
Nathan Adrian	Olympic Athlete (168k followers)
Leo Manzano	Olympic Athlete (212k followers)
Nastia Liukin	Olympic Athlete (390k followers)
Alli Simpson	Singer (1.41m followers)
Allie Marie Evans	model/actress (41.2k followers)
Tony Aguilarofi	Tony Aguilar Singer (41.2k followers)
Rudy Mancuso	Social Media Star (1.05m followers)
Tatyana McFadden	Olympic athlete (13.3k followers)
Kelsey Montague	Author/artist (1292 followers)
Chad Leclos	Olympic Athlete (258K followers)
Cody Simpson	Singer/Actor (7.5m followers)

[277] Ceni, Arber, and Marc Smith. Coca-Cola Twitter Data-set from NodeXL. Raw data. NodeXL, California.

To assess conversation levels emanating from the above influencers, each individuals' ego-network was captured and compared to the whole network (excluding Coca-Cola Japan). The Ego network represents the influencer and the influencer's fan base, that is, those individuals who either reposted the influencers content or mentioned the influencer in their own posts. The combined influencer ego network is shown in Figure 26.

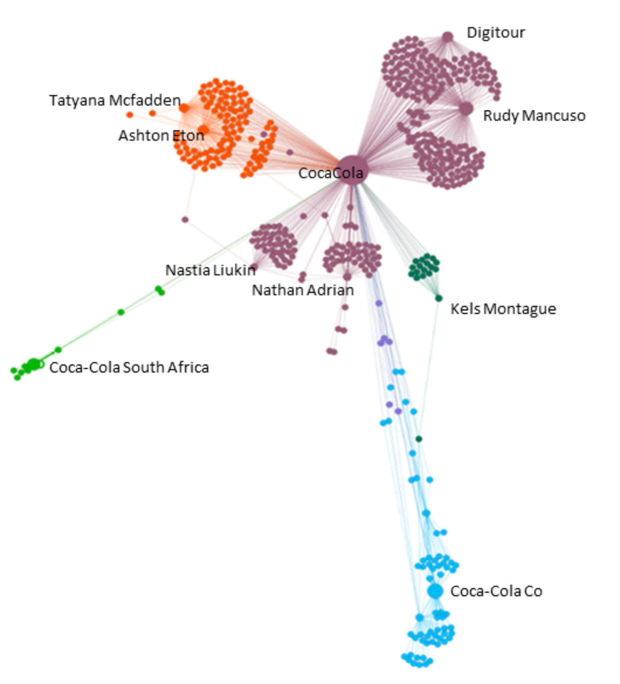

Figure 26. "That's Gold" Network[278]

The network was further tailored to display those individuals whose posts included "ThatsGold." This extraction yielded 501 nodes and 1,191 edges. Within the context of the #thatsgold on Twitter, 44% of conversations can be attributed to Coca-Cola influencers when excluding Coca-Cola Japan's Coke: ON campaign.

When assessing centrality scores of the "That's Gold" network (see Table 4), influencers tended to be the most central. For instance, influencers possess eleven of the

[278] Ceni, Arber, and Marc Smith. Coca-Cola Twitter Data-set from NodeXL. Raw data. NodeXL, California.

fifteen highest in-degree centrality scores. However, influencer betweenness centrality scores were lower as eight influencers possessed score of zero. This indicates that these actors are central to their own perspective networks, but these networks may be disconnected from each other. This illustrates Coca-Cola's focus on working with influencers who are connected to specific, highly engaged audiences.

Table 4. Centrality Scores of the "That's Gold" Network[279]

Indegree		Outdegree		Betweeness	
Id	Score	Id	Score	Id	Score
cocacola	425.00	cocacola	9.00	cocacola	4847.50
rudymancuso	201.00	syaxz_simspxon	4.00	allisimpson	931.00
digitour	118.00	leahstphill143	4.00	cocacolaco	367.50
ashtonjeaton	108.00	cocacola_za	3.00	alliemarieevans	316.50
tatyanamcfadden	83.00	drewftmarie13	3.00	leomanzano	227.50
nathangadrian	50.00	grierftwilky	3.00	chadleclos	72.00
cocacolaco	46.00	blessbieberx	3.00	nathangadrian	55.00
nastialiukin	44.00	iamdsbieber	3.00	cocacola_za	5.00
alliemarieevans	39.00	shawntly	3.00	drewftmarie13	0.00
allisimpson	29.00	mayrenicv	3.00	grierftwilky	0.00
kelsmontagueart	18.00	amjayofficial	3.00	blessbieberx	0.00
chadleclos	9.00	penelopeomg11	3.00	iamdsbieber	0.00
cocacola_za	7.00	livimooxx	3.00	shawntly	0.00
alexmorgan13	5.00	93tone	3.00	mayrenicv	0.00
leomanzano	5.00	payno199x	3.00	amjayofficial	0.00
nalbert12	2.00	gomezfireproof	3.00	penelopeomg111	0.00
mattechols1	1.00	scsantibanez	3.00	livimooxx	0.00
twistmag	1.00	enimsay_si	3.00	93tone	0.00
mcsaatchisande	1.00	vikyvane96	3.00	payno199x	0.00
roulopip1	1.00	barbykidrauhl94	3.00	gomezfireproof	0.00
cnortatl	0.00	unicornsarejack	3.00	scsantibanez	0.00
calumxmaine	0.00	julialatki	3.00	enimsay_si	0.00
yvette_ettevy	0.00	badfordallas	3.00	vikyvane96	0.00
jakey_2772	0.00	jdbyesim	3.00	barbykidrauhl94	0.00
nathanadronline	0.00	vthai_bizzle	3.00	unicornsarejack	0.00

D. COMPARATIVE ANALYSIS

The "Live for Now" and "That's Gold" campaigns are difficult to compare as they are not completely identical campaigns. Research indicates that both are major global

279 Ceni, Arber, and Marc Smith. Coca-Cola Twitter Data-set from NodeXL. Raw data. NodeXL, California.

initiatives. However, the "That's Gold" Campaign was shorter-lived and focused on one specific event—The Rio Olympics. Conversely, Pepsi's Live for now campaign is a long-term global campaign that still exists today. The "Moments Anthem" was merely a component of a broad strategy to increase their market position. Because of this, the following analysis does not aim to illustrate each companies' complete marketing strategies, nor does it assess which strategy was best. Rather, it draws out and assesses specific network-centric characteristics of each companies' marketing strategies and comments on both companies' operational successes and challenges.

During each campaign, both companies used social networks by identifying and leveraging actors close to or within their target audiences. During the "Live for Now" Campaign, Pepsi used Kendall Jenner as a primary advocate to target teenagers and young adults. The "That's Gold" Campaign leveraged a myriad of athletes and social figures to influence its target audiences. Additionally, both companies placed a significant amount of time, resources, and energy building their internal creative networks. For instance, Pepsi positioned itself within Omnicom's creative agency network in order to achieve the best quality and efficiency. They built the Omnicom platform to draw creative talent across various agencies. Coca-Cola implemented a hybrid agency model that connected agencies, creative talent, and brand fans.

These two cases also possessed key differences. While both sought to streamline their organizational structure, Coca-Cola's internal creative network seemed to be more comprehensive, while Pepsi's network was more focused. Pepsi better positioned its marketing structure within Omnicom's creative network by creating Galaxy—an administrative platform that allowed Omnicom and Pepsi execs to find talent tailored to business objectives. Pepsi's strategy seemed to hone its ability to find creative talent within advertisement agencies. Coca-Cola implemented a similar strategy but integrated a holistic approach by expanding its network-paradigm past the traditional agency-client model. The company included its fanbase and creative talent within the content creation process. This strategy shift occurred due to the brand's understanding that more Coke-centric content is produced by their consumer base than internal to the company. The company thus attempted to develop a strategy to leverage this characteristic. Pepsi seems to have attempted a similar strategy during the same time period. The company created an internal agency in hopes of becoming the nexus for content development, rather than reaching out to various agencies for media product development. It aimed to bring together creative organizations and key individuals. This model seems to have experienced setbacks as their internal content creation network appears to have become more insular. The Moments Anthem setback appears to have been a temporary setback, as the company continues to use the Creators League Studio presently.

The two companies also displayed differences in how they leveraged external networks. Within the "Live for Now" Campaign, the Moments Anthem seemed to focus on celebrity advocates—using individuals with broad appeal and a wide reach. Key advocates include Nicki Minaj and Beyoncé—both of which have more than fifteen million followers according to Twitter.[280] Within "That's Gold," Coca-Cola used influencer marketing. They identified social leaders with smaller yet more engaged followings. The thirteen followers noted within the latter Coca-Cola Olympics network possessed an average of 1.13 million Twitter followers. Accounts ranged from 1,292 to 7.5 million followers. Five of these influencers possessed less than 100,000 Twitter followers. Celebrity advocacy and influencer marketing provide differing benefits and costs. Celebrity advocacy may build a company's notoriety and increase the company's reach. However, this strategy can be costly. For Example, Meghan Casserly notes that Pepsi signed a $50 million deal with Beyoncé to represent the brand.[281] Influencer marketing has a narrower reach but capitalizes on a more engaged and trusting audience. Additionally, influencers with smaller followings are generally less expensive to work with.[282]

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[280] Social Blade, "Compare Beyonce and Nickiminaj Twitter Statistics (By Social Blade)," accessed November 12, 2018, https://socialblade.com/twitter/compare/beyonce/nickiminaj.

[281] Meghan Casserly, "Beyoncé's $50 Million Pepsi Deal Takes Creative Cues from Jay Z," *Forbes*, December 10, 2012, https://www.forbes.com/sites/meghancasserly/2012/12/10/beyonce-knowles-50-million-pepsi-deal-takes-creative-cues-from-jay-z/#352f0b7e4346.

[282] Janet Comensos, "How to Determine If Your Brand Should Go With a Celebrity Endorser or Influencer," accessed November 12, 2018, https://www.adweek.com/brand-marketing/how-to-determine-if-your-brand-should-go-with-a-celebrity-endorser-or-influencer/.

IV. ANALYSIS, FINDINGS, AND CONCLUSION

This chapter describes key trends amongst the four case studies. It identifies five findings based cross-case analysis. Specifically, findings are derived from key successes and challenges experienced by organizations within the case studies. From these findings four inferences are derived. The thesis then comments on implications and how these inferences could be applied to the MISO regiment. These comments are largely based on the author's experience as a MISO subject matter expert.

A. ANALYSIS AND FINDING

Finding 1. Time is a significant factor as it pertains to the development of influence networks: Time is a critical component to leveraging social networks for influence purposes. Based on insights derived from the cases, it appears that effective influence networks cannot be built in the wake of a current conflict. This characteristic is salient when observing the nonstate actor cases. The networks and relationships that emerged during the Egyptian revolution were not solely derivative of the current conflict. Rather, these networks evolved from existing relationships that formed over several years. This network familiarity may have contributed to activist organizations' ability to create a specific identity and collaborate in support of tangible objectives. Conversely, the Occupy Wall Street Movement's founding groups do not appear to have had the same level of historical organizational ties leading up to the movement. This lack of experience with one another may have limited the movement's ability to form a concrete identity and pursue common objectives. For instance, the movement's founders expressed significant doubts about OWS's core principles and structures, specifically as it pertained to the general assembly. Anna Szolucha's dissertation, "No Stable Ground: Real Democracy in the Occupy Movement" presented interviews with OWS coordinators. Below are excerpts that help explain the network's lack of experience.

> Although the consensus structure was agreed to in at least three GAs [general assemblies], and opportunities for changing it were made, the legitimacy of the consensus process was always severely questioned from all angles (traditional left, disillusioned participants or people who were

> new to the process). In the long run, this significantly undermined people's commitment to and respect for the process.[283]

The article goes on to discuss the lack of experience members had with one another and how this affected trust internal to the movement.

> It was a group of people that were very eclectic and ad hoc and didn't have necessarily a long-term commitment, and didn't know one another. People didn't necessarily trust each other at the start. Nobody used second names. People wouldn't like to give their email addresses or phone numbers because of what we were doing was potentially illegal.[284]

This unfamiliarity degraded the movement's ability to build an identity, collaborate, and form realistic objectives. This is not to say that the Egyptian Revolution was saturated with trusting relationships. Rather, the revolution's activist network was comprised of organizations in which leaders were already familiar as reported earlier in this paper.

Coca-Cola's network development also possessed a time constraint. It spent a considerable amount of time and resources identifying influencers and building relationships. For the Rio Olympics, Coke marketers spent nearly two years building an influencer network. Lee Odden explains that this characteristic stems from industry failures associated with the use of influencer marketing. Those programs in which influencers are used for short-term, individual events often do not produce acceptable levels success.[285] These short-term strategies were replaced by the development of long-term, mutually beneficial relationships that fostered dialogue between the consumer, influencer, and the business.[286] The latter insight indicates that influence networks require inter-organizational and interpersonal trust based on mutually beneficial relationships. These

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[283] Anna Szolucha, "No Stable Ground: Real Democracy in the Occupy Movement" (PhD diss., National University of Ireland Maynooth, 2014), 148.

[284] Szolucha, 149.

[285] Lee Odden, "Marketers Begin to View Influencer Relationships as Strategic," CMO, January 26, 2017, https://www.cmo.com/opinion/articles/2017/1/24/majority-of-marketers-ready-to-get-strategic-about-influencer-relationships.html.

[286] Kamiu Lee, "The Road Ahead for Influencer Marketing: 2018 and Beyond," Entrepreneur, December 28, 2017, https://www.entrepreneur.com/article/306688.

relationships take a significant amount of time to cultivate. Because of this, organizations who aspire to leverage social networks must start relationship building years ahead of time.

Finding 2. Driving influence through social networks requires a network of influencers rather than one or two central actors: The case studies indicate networked influence is most successful when it emanates from multiple nodes within the network, rather than just one. Three of the four cases included this characteristic to varying degrees. The Egyptian Revolution and OWS both experienced a coalescence of activist organizations to form a stronger base of operation. The Egyptian Revolution was unique in that the activist network structure possessed ties to both social leaders and political leaders. The OWS experienced challenges achieving political objectives because the movement consciously avoided political affiliation. This dynamic speaks to the diversity required to achieve tangible objectives.

Coca-Cola leveraged a cadre of influencers that ranged from artists to athletes. Influencers were tailored to the Olympics' context and specific target audiences. Pepsi, however, centered the "Live for Now" Moments commercial on one celebrity. While this method certainly could be successful if the right celebrity is chosen, it appears the consequences are more pronounced when mistakes occur. Pepsi's use of Kendall Jenner to speak about serious social issues certainly caused a significant backlash. If actors closer to "Black Lives Matter" were used, the campaign's credibility might not have experienced such blowback. The outcome of the "Live for Now" case speaks to the need for rigorous advocate selection processes." Through this analysis, it appears that the use of multiple influencers who possess a more intimate relationship to specific target audiences reduces risk and may stimulate more nuanced engagement. This is due to the organic nature of influencers' communication. While celebrity advocacy helps organizations reach a wide audience, mismatches between content, context, and the communicator could result in significant blowback. Based on this analysis, the following two conclusions can be made. *To produce networked influence, MISO elements should identify many influential nodes with the highest degree of intimacy with the Target Audience. To build effective influence networks MISO teams should develop a mutually beneficial relationship with their influencers. This takes a long time, possibly years*.

The latter two findings have implications for the MISO regiment. MISO teams could potentially adopt influencer marketing strategies developed by companies like Coca-Cola, specifically for social media. Many social leaders have a presence on social media platforms. Using social network analysis software to analyze samples from social media APIs provides MISO teams with data necessary to identify potential influencers who connect with key audiences. Social media analytic companies like Traackr and Demographics Pro could assist MISO teams in studying target audiences and finding key influencers within those audiences. It appears that measures like in-degree and out-degree centrality, as well as betweenness centrality are central components to Traackr's analysis software. Traackr's tutorials and internal blog illustrate how influencer marketing systems are developed and implemented. These systems could potentially be applied for military influence purposes.

The following paragraphs delineates how MISO elements could use influencer marketing techniques if not bound by administrative and bureaucratic restrictions.

1. Identify key influencers within or close to a particular target audience. To do this, MISO Teams could conduct key word searches in conjunction with demographic and locational parameters using software similar to Traackr. Data would then be displayed as a social network. Teams could then conduct a topographic analysis of the network identifying critical characteristics like those who are most central or those who are information brokers.

2. Analyze Influencers. Once potential influencers are identified, further analysis would be implemented to assess the nature of the influencer's relationship with the MISO Team's target audience. Tracker indicates that influencers should be examined using the following criteria: Reach—how many followers see their content, resonance—the level of engagement the influencer receives, and relevance—how consistently the influencer discusses topics important to the company, or in this case, the MISO

team's objectives.[287] This step assesses how capable the influencer is in supporting a desired behavior change.

3. Engage Influencers. If suitable candidates are found, the MISO team then moves to engage the influencer. Traackr describes this process in terms of climbing the rungs of a ladder (described in Chapter III). The ladder of engagement appears to require a significant amount of time and effort. Teams slowly build relationships with these key individuals and organizations on social media and eventually in person. While this is occurring, the team assesses the potential to create a mutually beneficial relationship—one that contributes to the MISO teams desired behavior.

4. Foster a relationship. The resulting candidates are those individuals who have established a committed relationship with the team and has the ability to organically engage its target audience to help achieve shared goals. This means that the relationships must be sustained for long-term objectives.

This process, while effective if done properly, poses significant challenges for MISO teams. Implementing an influencer program would require resources and expertise that MISO personnel do not currently possess. First, in order to conduct social media and social network analysis on a foreign target audience, MISO teams would require a native language capability on a par with permanent cultural advisors or interpreters. Many MISO teams lack this resource. Second, once potential influencers are identified, the process of engagement would, no doubt, be difficult. It is conceivable that potential influencers would deem a relationship with the U.S. government inappropriate or even dangerous. In these cases, intermediary organizations like partner nation governments or NGOs would be required.[288] Other avenues of engagement may lie in covert action—using front

[287] Jennifer Mac, "Searching for New Influencers," Traackr, accessed October 13, 2018, http://help.traackr.com/building-your-influencer-network/searching-for-new-influencers.

[288] These conclusions are drawn based on the author's operational experience within the MISO community.

organizations to run engagements. Third, influencer marketing requires a tolerance for failure. Lux Narayan notes that critics of the strategy believe this technique requires companies to relinquish some control of the message. Influencers may disregard guidance, say the wrong thing, or lose credibility if the target audience senses the message to be inauthentic.[289] Because of this, Special Operations and interagency leadership would require a tolerance for ineffective influencers.

Fourth, influencer marketing campaigns appear counter-intuitive to Military resourcing processes. Military resourcing is objectives-based, especially as it pertains to MISO. When MISO teams produce programs that require funding, the approval process scrutinizes the intended behavioral or attitudinal change.[290] However, an influencer program could take years to cultivate. Because of this characteristic, new MISO programs would most likely need to leverage components of an already standing influencer network. This parallels Coca-Cola and Traackr's "always on" paradigm (explained in Chapter 3). In the end, an influencer program risks the perception of "network building for the sake of network building" if the program is not tied to clear objectives. Ultimately, a program modeled after business-centric influencer marketing programs would require MISO resourcing processes to be adjusted. Because of this, commanders would need to complete a cost-benefit analysis of integrating such a program.

In any case, MISO teams, as well as other agencies that operate in foreign countries, do build indigenous relationships by nature of their operations, albeit this relationship building is not part of a concerted iterative process. For instance, MISO teams, Public Diplomacy, USAID, Civil Military Support Elements (CMSE) and other SOF elements all develop relationships with actors that have access to specific target audiences.[291] These

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289 Lux Narayan, "It's Time for a Reboot of Influencer Marketing," Ad Week, February 1, 2018, https://www.adweek.com/digital/lux-narayan-unmetric-guest-post-reboot-influencer-marketing/.

290 Programs that use funds specifically allocated to MISO elements include intended behavioral changes within a target audience. While developing a MISO program without specifying a behavior change may be possible, this type of program would be against the operational norm.

291 These organizations intuitively build relationships within the indigenous population to accomplish their specific missions. For instance, a CMSE may build a relationship with key leaders from a states medical community, Department of State may posses relationships with indigenous media organizations, and USAID may naturally build relationships with key members of a state's agricultural community.

actors could be seen as influencers. Tracking these relationships holistically using social network analysis software could provide MISO teams with a common operating picture of available influencers capable of supporting future programs.

Finding 3. The effect of tangential nodes: The effect of tangential nodes can be seen within the Egyptian Revolution and "Live for Now" cases. During the Egyptian revolution, forward deployed mainstream news affiliates acted as key information brokers. They provided a critical information link to the rest of the world. Sociograms indicate that information flowed from ground-level bloggers and activists to these news affiliates and then to official western news hubs. While these news affiliates were not directly involved in the activist network, they fulfilled a critical role within the revolution. After the "Live for Now—Moments" video was released activist, Bernice King directly affected the video's trajectory. King, a more credible speaker, amplified negative sentiment for the commercial and thus increased the severity of the negative blowback toward Pepsi. Both campaigns within these cases were drastically affected by unforeseen influencers. This insight leads to the following conclusion. *As it pertains to the MISO regiment, teams should seek to identity actors within the information environment that could disrupt messaging programs. This becomes more important as MISO teams use social media as a messaging platform.*

Finding 4. Internal Network Structure: All four cases described the organizations' specific internal networks. Occupy Wall Street's structure was decentralized. This helped the movement grow but ultimately stifled its ability to achieve tangible objectives. Conversely, the Egyptian Revolution possessed a more centralized structure, which helped the revolution achieve political objectives. Pepsi capitalized on key brokers within its agency network to find creative talent. Coca-Cola became central to its creative network by linking external creative assets together and synchronizing them through their liquid-linked strategy. Those cases that illustrated some degree of centralization within the organizations' networks experienced success in achieving defined objectives.

When examining the business marketing cases, three characteristics become clear. First, both companies placed a significant amount time and resources forming their internal marketing structures. Second, marketing structures revolved around increasing efficiency or quality of content. Third, both companies' structures relied upon outside assistance. Agencies, individuals, and organizations external to the corporate structure were used to develop influential content. When applying this insight to the MISO community, one can assess that *the best content does not come from within the MISO organization. Every MISO element should identify all external content development sources and apply an operational calculus that determines how these content builder "nodes" can be linked and synchronized.*

This insight has both doctrinal and administrative implications for the MISO community. First, MISO doctrine is oriented toward internal content development. That is, MISO planners control the planning, development, and dissemination of influential content. This doctrinal characteristic has practical purposes as MISO elements may conduct operations in non-permissive environments where there is little external support.[292]

MISO doctrine revolves around a seven-phase cycle. The phases are designed to complement planning systems like the Military Decision-Making Process and the Joint Targeting Cycle. The cycle consists of the following steps: (1) Planning—identifying specific foreign target audiences and corresponding behaviors that affect military objectives; (2) Target Audience Analysis—the psychological analysis and validation of key foreign audiences; (3) Series development—the creation of information campaigns oriented toward changing the behavior of specific target audiences; (4) Series Development—the development of information products focused on changing target audience behaviors; (5) Approval Process—The development decision points and decision authorities within the campaign; (6) Production, distribution, and dissemination—the

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292 This conclusion is based on the author's operational experience within the Central Command (CENTCOM) area of responsibility.

execution of the MISO Campaign; (7) Evaluation—assessing how affective the campaign was.[293][294]

When viewing this process through a business frame of reference, Phases One, Two and Seven share similarities with marketing. Planners identify which segments of the population to engage, they analyze psychological characteristics and identify the best media platforms to leverage. They then measure success and failure. Phases three through six are more creative in nature and resemble advertising. These phases generally involve the development of persuasive content based on findings from the target audience analysis.

Ultimately, MISO doctrine demonstrates an organizational system in which marketing and advertising components are combined into one unit. This organizational

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[293] The following is a more detailed description of the seven-phase MISO process:

Phase 1: Planning**;** During this phase, MISO teams study commander's objectives and influence-centric security problems within a foreign country. They then identify various audiences and behaviors that contribute to or hinder these objectives.

Phase 2: Target Audience Analysis; This phase analyzes and validates the audiences and behaviors identified during phase 1. MISO personnel identify environmental and psychological factors that are causing detrimental behaviors. They also assess key psychological vulnerabilities within the audience to understand their desires and fears. They identify which information platforms are best for engaging the target audience and ultimately develop baseline appeals and arguments resonant enough to convince or coerce the audience to change its behavior.

Phase 3: Series Development; This phase involves synthesizing the information form the target audience analysis to building the framework of an influence campaign. During this phase, MISO teams pair media platforms and persuasive arguments to build product concepts. These products are then scheduled on a dissemination timeline.

Phase 4: Product development and design; During this phase, information products are built. The products' designs are annotated on a Product Action Worksheet (PAW), which provides details on all creative aspects. These details include scripts and storyboards as well as detailed descriptions concerning what print products should look like. During phase four, product prototypes are created and pretested using surveys and focus groups.

Phase 5: Approval Process; During this phase, MISO personnel set up an approval process focused on the campaign. Ultimately, approval the process should delegate product development and dissemination authority to the lowest level while mitigating risk and maintaining content quality.

Phase 6: Production, Distribution, and Dissemination; During this phase, information products are produced and ultimately disseminated via chosen information platforms. Dissemination is sequenced to support combat operations or phased to achieve specific objectives.

Phase 7: Evaluation; This phase aims to gauge the program's effectiveness. That is, was the program successful in changing the target audience's behavior or attitudes?

[294] Joint Chiefs of Staff, *Military Information Support Operations*, JP 3-13.2, incorporating change 1 (Washington, DC: Department of Defense, 2010), v-1–V-2, http://www.bits.de/NRANEU/others/jp-doctrine/JP3-13.2C1(11).pdf.

dynamic contradicts both Coca-Cola and Pepsi's marketing and advertising strategies. The two companies outsource the creative aspects of their campaigns to specialty organizations –advertising agencies and other content-centric organizations. Consequently, Coca-Cola and Pepsi focus less on building content themselves and place a significant amount of time, resources, and energy in positioning themselves within the creative network. This allows them to develop the highest quality content in the most efficient way possible.

The U.S. doctrinal model for Psychological Operations, described through the business-marketing lens, is most similar to the "in-house" advertising agency setup illustrated in the Pepsi "Live for Now" case. In this case, Pepsi attempted to streamline their processes and speed up development by creating the in-house content development studio—Creators League. The studio came under strong criticism after the "Live for Now—Moments" video aired. Some of the studio's critics seem to have misinterpreted the Creators League's purpose. Artists, directors, and actors were not meant to be permanent employees of Pepsi. Rather, Pepsi intended their in-house studio to be a nexus for external creative talent, all under the Pepsi umbrella. This nexus paradigm still differs from the U.S. MISO doctrinal model, however. A better analog would be this: A marketing team from Pepsi's Corporate Headquarters in New York travels to a foreign county temporarily, conducts market research on a foreign target audience, and then develops persuasive content. This type of system seems quite implausible and would most likely be rejected by both companies, given that each has local headquarters in foreign countries.

While the application of MISO doctrine seems counterintuitive and possibly impractical through the lens of business marketing and advertising, there are certainly practical reasons explaining why this doctrine incorporates both targeting and content development. First, current MISO doctrine provides a holistic tool for referencing the fundamentals of influence. Secondly, as part of an expeditionary force, there may certainly be situations in which MISO elements do not have access to external creative talent, particularity in non-permissive environments. These restrictive environments call for unilateral messaging.[295] Because of this, MISO doctrine should still incorporate the seven-phase process. Nevertheless, most MISO operations do not exist during major combat operations. Most deployed MISO elements support aspects of Operational Preparation of the Environment (OPE). Barring heavily non-permissive operational environments, most SOF elements have the flexibility to connect with indigenous resources during OPE.[296]

During OPE, it appears that in many cases MISO operations occur outside of the scope of traditional doctrine. For example, production and advertisement companies are often hired to create content. Analysis companies such as Madison Springfield Incorporated develop comprehensive target audience analyses that assist MISO teams in developing programs.[297] Because of this, there is dissonance between doctrine and real-life MISO operations. In the end, doctrine, training, and education should not only teach the basics of marketing and advertising. They should also incorporate the best practices for leveraging external creative talent. This helps ensure these practices eventually become institutional knowledge. MISO elements must be empowered to view content developers like production companies and NGOs, as part of a content development network, similar to Pepsi's Galaxy model and Coca-Cola's liquid-linked strategy. This means placing significant emphasis on identifying those organizations that possess content development capacities, assessing what type of media they are best at creating, and examining how these organizations complement each other. Ultimately, MISO teams should leverage and synchronize these resources based on capabilities and network relations.

This change is certainly feasible, save multiple administrative constraints. Using these organizations in a synchronized manner entails access to funds and thus requires a

[295] MISO operations are not contingent upon a permissive environment. Within high risk, non-permissive environments that restrict MISO teams' ability to build relationships, messaging should continue albeit from unilateral platforms. MISO teams have a variety of messaging equipment that allow military units to disseminate information via audio, video, or audio-visual channels without the use of indigenous media platforms.

[296] This insight is based on the Author's operational experience within the MISO and Special Operations community.

[297] This insight is based on the Author's operational experience within the MISO and Special Operations community.

precise understanding of the contracting process. The U.S. Army Combined Arms Support Command explains that contracting centers on specific requirements that are defined in supporting documents like statements of work (SOW) or performance work statements (PWS). These documents provide a detailed summery of potential contractor duties and objectives.[298] While the MISO team develops the SOW, a military contracting officer is legally bound to manage the vendor solicitation, bidding, and selection. These contracting officers may not have a full understanding of the MISO team's operational requirements. Because of this, a MISO program's transition from a series packet to a statement of work and then to vendor solicitation is treacherous. The program risks losing its operational integrity as MISO teams transpose the contents of the series into the SOW and as contract requirements are communicated to bidders. For this reason, emphasis should be placed on contract development within the PSYOP Qualification Course and pre-mission training. While teams typically attend basic contracting courses before deployments, this training usually fulfills legal requirements, and the training is often non-MISO specific. Proficiency in adapting MISO programs to the contracting process will increase a team's ability to strategically leverage their creative network in support of their goals.[299]

Finding 5. Large organizations underwent significant strategic organizational and paradigmatic shifts: When studying the cases, it appears that strategic paradigmatic shifts occurred, specifically within the business cases. While these shifts were not abundantly clear within the nonstate actor cases, this characteristic is still worth looking into. In the cases, companies pursued major organizational reformations due to environmental factors. Both companies transitioned from a traditional agency-client model and moved toward a system that attempted to increase the effectiveness of their creative networks. This occurred in the wake of the information environment's evolution. Senior marketing execs from both brands commented on the difficulties associated with messaging within a more complex information environment. Both companies showed

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[298] U.S. Army Combined Arms Support Command, *Developing a Performance Work Statement in a Deployed Environment*, Handbook 09-48 (Washington, DC: U.S. Army, 2009), 3, https://www.acq.osd.mil/dpap/ccap/cc/jcchb/Files/Topical/SOWs/09-48.pdf.

[299] This insight is based on experience working with MISO-centric contracts.

evidence of modifying their internal structures to cope with these difficulties. *PSYOP Elements should shift their operational paradigm away from content development and focus more on managing influence networks.* While it is evident that new marketing industry initiatives like influencer marketing would require major organizational shifts, much can be done at the team level, starting with a mentality shift. MISO teams should think in terms of network management rather than content development. One of MISO's most central challenges is building content that resonates within target audiences. This can be exceptionally challenging, if not impossible in a cross-cultural environment within a deployment span of six months. Because of this, it seems evident that MISO elements must place significant emphasis on finding and leveraging those organizations and individuals that are better positioned to communicate with the U.S. Military's Target Audiences. This requires a concerted effort that should ultimately be captured in new doctrine, training, and funding platforms.

B. CONCLUSION

Through analyzing business and non-sate actor cases several insights can be drawn. Within the Egyptian Revolution: The movement experienced a significant coalescence of smaller activist organizations. In particular, the April 6 Movement was a driving force behind the establishment of relational connections between the many activist organizations operating in Egypt in 2011. This was accomplished by exploiting some long-standing organizational ties, incorporating new charismatic figures like Wael Ghonim into the activist network, and building formal, hierarchal institutions to leverage the activist network efficiently. Social network analysis indicates that mainstream media was central to the movements Twitter environment. Field reporters affiliated with mainstream news networks acted as information brokers or gatekeepers that transferred information to the rest of the world.

The Occupy Wall Street Movement also experienced a significant coalescence during the months leading up to September 17 protests. Multiple, small and often struggling activist groups coalesced under Adbuster's call to action. This coalescence built a shared consciousness that accounted for some unique ideological characteristics within the group.

However, as these groups united they built a horizontal and leaderless command structure, which made leveraging social networks more difficult. Social network analysis indicates that the movement spread very quickly across the country. It also suggests that mainstream media was not as central to the movement's network when compared to the Egyptian Revolution.

Pepsi placed significant focus on positioning itself within a robust creative advertising agency network. This allowed the company to identify talent and create quality persuasive content. Pepsi transitioned its creative network in order to adapt to the evolving information environment and the ubiquity of social media. To accomplish this Pepsi built an in-house advertisement studio with the goal of becoming a nexus for creative talent. This ultimately increased the insularity of Pepsi's creative network, which may have led to the development of socially insensitive media products during the Live for Now campaign, such as the infamous "Moments Anthem" video. Pepsi leveraged "A-list" celebrity advocates to drive the campaign. However, network analysis indicates that while Pepsi's celebrity—Kendall Jenner had a wide reach, she may not have been the most credible actor to comment on the serious and controversial social issues illustrated by one of Live for Now's commercials. Ultimately other influential actors within Pepsi's network amplified the negative blowback due to the Live for Now Moments video.

Coca-Cola also placed significant focus on positioning itself with a creative network. Similar to Pepsi, Coca-Cola developed a networked agency model that extracted individual talent form across multiple agencies. It also expanded its internal creative network to include members of its target audiences. To help drive this strategy, Pepsi leveraged influencer marketing—a tactic that identifies and focuses on individuals with highly involved and trusting audiences. Network analysis indicates that these influencers helped drive a significant amount of conversation about the "That's Gold Campaign."

Analysis concludes that the development of influence networks require a significant amount of time to develop, internal network structure may be just as important as content development, target audiences should be leveraged through a robust network of influential actors rather than a few central figures, and that large organizations such as Coke and Pepsi underwent a significant network-oriented paradigm shift to cope with the evolving information environment. Findings indicate that MISO teams should develop network manager approaches for building content relevant to specific target audiences. That is, understanding that the best persuasive content does not come from within the MISO organization. It emanates from a network of many indigenous influential actors close to or within a target audience. To leverage these networks MISO teams should identify, engage, and build mutually beneficial relationships within the influence network. This is a slow and gradual process that should be initiated during Phase 0 Operations and most likely will require a modified doctrinal, administrative, and logistics framework.

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