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Digital Disobedience and the Limits of Persuasion: Social Media Activism in Hong Kong's 2014 Umbrella Movement

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Abstract

This article probes the catalytic features of social media in civic participation and mass civil disobedience in Hong Kong's 2014 protests, and conceptualizes digital activism in terms of mobilization, organization, and persuasion. It makes use of in-depth interviews, in English, Mandarin, and Cantonese, with 40 of the leading users of social media during the protests. These included, first and foremost, student activists, as well as opposition figures and journalists who reported on the protests. The article finds that the velocity and scale of social media have strengthened protesters' ability to mobilize and organize, on the Internet and in the streets. Yet, these advantages have not carried over into persuasion of previously uncommitted individuals. Protesters encountered two main obstacles to persuasion via social media: the multitude of messages enabled by social media and the age segmentation of media. As a result, the movement's social media efforts generated new attention and created digital space for activism, but did not persuade a durable majority of Hongkongers of the movement's legitimacy. The Umbrella Movement may not have persuaded Hongkongers that their movement and tactics were valid or wise, but the existence of social media allowed protest leaders to document their motivations and conduct, and blunt less flattering narratives in legacy media.

Keywords

activism, digital media, Hong Kong, journalism, social media

In fall 2014, after a decision by the Central Government blocked Hongkongers from directly electing their own chief executive, protests erupted in the city's streets. This physical protest followed after more than a year of digital activism by the founding organizers of the original Occupy Central with Love and Peace (OCLP) movement, who had, since 2013, used social media as a tool for deliberative democracy to pressure the Hong Kong government on electoral reform. This digital infrastructure was designed to undergird a mainly symbolic protest movement; organizers did not anticipate their cause would gain enough traction to physically block Hong Kong's streets, or have a major impact on Hong Kong's civic life. During and after the largely spontaneous mass physical occupation of protest sites in central Hong Kong began in September of 2014, spurred by the Beijing Central Government's decision to limit promised direct elections for Hong Kong's chief executive and by the subsequent use of tear gas by police to disperse growing crowds of protesters, many of these platforms continued to operate. In these dramatic events, social media played a role in catalyzing collective action and deliberation about Hong Kong's political system. Activists drove debate on a range of issues in Hong Kong society, including inequality, job prospects, and political reform, taking to social media to communicate supporters, adversaries, and the local and global press.

Through the fall of 2014, the Umbrella Movement surprised many observers, because it represented an unusually large and forceful statement of defiance against the leadership of Hong Kong and the mainland Chinese government. Moreover, it commanded wide attention from 8 million residents of Hong Kong, conservative opponents in business and media, political leaders in Hong Kong and Beijing, and local and foreign reporters. Media consumers around the region and the world watched to see how the Communist Party would react to unrest in a territory whose autonomy it had guaranteed under treaty with the British government.

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This article explores this catalytic effect of social media on digital and physical activism by interviewing participants in the 2014 Umbrella Movement. It looks at the ways protesters used digital platforms (mainly WhatsApp and Facebook, WeChat, and Firechat) during the debates about elections for Hong Kong's Chief Executive. Methodologically, our use of in-depth interviews builds on the studies that have used focus groups (Lee & Ting, 2015), telephone interviews (Lee, So, & Leung, 2015), online surveys (Lee & Chan, 2015), and onsite studies (Lee & Chan, 2018). We will explore (a) how protest leaders used social media as a component of digital activism during the 2014 protests, (b) what unique elements their social media use add to the movement, and (c) to what extent the activists' social media usage lead to successes in organization, mobilization, and persuasion beyond the movement.

Social Protests and the Umbrella Movement in Hong Kong

Several features distinguish Hong Kong as a site for collective action. It is geographically compact, affluent, multilingual, high-tech, and a global hub for finance and media. Mobile technology and social media are ubiquitous. As a polity, Hong Kong balances its British colonial legacy with strong links to mainland China: it is a semi-autonomous Special Administrative Region under the sovereignty of the People's Republic of China and its Central Government in Beijing. Compared with previous political demonstrations in Hong Kong, the Umbrella Movement was unprecedented in its scale and degree of contentiousness, and the first political protest to involve major sustained physical disruption to Hong Kong's urban fabric, with major physical protest encampments in two prominent locations: Admiralty (in the heart of Hong Kong Island's central business district) and Mong Kok (a densely populated working class area on the Kowloon Peninsula). A third, comparatively minor protest site was located in Causeway Bay, a dense commercial neighborhood 3 km east from the main Admiralty protest site.

By focusing on Hong Kong, this study shows how social media activism is shaped both by characteristics particular to Hong Kong, as a cosmopolitan entrepôt of 8 million people, and the territory's status as a semi-autonomous region of the People's Republic of China, a vast and populous territory with its own fraught history of social unrest. Hong Kong's protests occurred in a context of relatively high degree of freedom of expression, a common-law judiciary system inherited from Britain, and easy access to major news bureaux within walking distance of the Admiralty protest site, but also amid the prospect of tightening authoritarian political control from Beijing. Critically, social media activism in Hong Kong takes place in a jurisdiction that feels influence from mainland China: there is significant state-backed surveillance, and substantial economic leverage over local media firms by the Communist Party, which controls access to markets on the mainland (Frisch, Belair-Gagnon, & Agur, 2017).

The Umbrella Movement thus offers a useful case study in digital and physical dissent: its anti-authoritarian protests occurred within the borders of an authoritarian country, but in a uniquely insulated geographical and virtual space where normal physical and digital coercive measures were impractical or too costly for the authoritarian state to deploy. On one hand, it was a rare example of an unfettered anti-authoritarian protest; as in Egypt, its motivations were anti-authoritarian. On the other hand, it had characteristics of mass protests and digital activism in open societies. It was launched against the political actions of a police state, but within a framework where civil liberties are protected.

For scholars conceptualizing social media activism in Hong Kong, there are important contrasts with mainland China. For example, Hong Kong has no censorship regime, thus allowing citizens to undertake sophisticated digital activism for a sustained period without government intervention in the online discourse. At the same time, people in both Hong Kong and the mainland, when they feel their government is unaccountable, often use digital space to contend and dispute the government's preferred narrative, and voice specific grievances. In mainland China, these protests cannot be overtly political (some economic and environmental discontent is tolerated), whereas in Hong Kong, which has limited representative democracy, social media activism fills the place of many debates that might otherwise occur within the framework of a fully representative political system.

Literature Review: Covering Protests in Hong Kong

Given Hong Kong's role as a global media hub, efforts at collective action there have made extensive use of mass media to gain international attention and legitimacy (Chan & Lee, 2007). Even before the handover in 1997, mass media began to take on complex roles as informers and interpreters of protest movements, and the battlegrounds on which different sides strive to persuade critical masses of Hongkongers (Chan, C. K., 2014; Chan, J., 1992; Chan, M., & Lee, C. C., 1984; Chiu & Lui, 2000). In the years since, Hong Kong's social media platforms have become not just one-off tools for individual protest events, but also essential parts of "self-mobilization processes" in which protest movements inspire new contestations in public discourse (Lee & Chan, 2010, 2013; Ortmann, 2015). Activists, in their efforts to organize and mobilize within the movement, and persuade larger audiences, have emphasized networked production and dissemination of news on social media, making use of bloggers, individual journalists, and news organizations (Agur, 2019; Belair-Gagnon, Agur, & Frisch, 2016, 2017a, 2017b; Chan, J., & Lee, F.L.F., 2015; Chan, M., & Lee, F. L. F., 2012). In this new political context, certain critical events may form

watershed moments whereby public and elite perceptions of reality shift abruptly and galvanize civic engagement (Lee & Chan, 2010).

One such shift occurred during the protests that took place on 1 July 2003, when half a million citizens of the city demonstrated against national security legislation proposed under Article 23 of the Basic Law. Participants have used subsequent 1 July marches to channel opinions on topical issues ranging from universal suffrage and the conservation of historic buildings to press freedom and minority rights (Ku, 2009; Wong, 2015). The result has been an active, open, and regenerating space for digital activism.

Episodic protests over the years have focused on more singular controversies, sparking moments of digital activism with limited continuity. Online citizen media platforms have allowed concerned Hongkongers to discover others supporting particular causes, such as campaigns against visitors from mainland China (Ip, 2015), the new preservation movement (Chen & Szeto, 2015), the Guangzhou-Hong Kong Express Rail Link (Hung & Ip, 2012), and the proposed "Moral, Civic and National Education" curriculum (Morris & Vickers, 2015). In these examples, social media platforms have served as critical nodes for large-scale social mobilization and digital activism in Hong Kong (Cheng, 2016; Ma, 2011; Wong, 2015). Taiwan, a self-ruling island off China's southeast coast, not far from Hong Kong, is another polity with a similar socioeconomic profile and ambiguous political position toward China. Taiwan also experienced mass, digitally driven "Sunflower Movement" political protests in 2014, a watershed moment in digital activism in Taiwanese politics (Chao, 2014; Rowen, 2015). Taiwan's protest leaders routinely compare tactics and strategies with their Hong Kong counterparts, creating templates and tactics for digital activism that are shared beyond the borders of their respective polities.

Studies of the Umbrella Movement have emphasized the efforts by the mainland Chinese government to surveil, disrupt, and sow misinformation in digital communications related to political protest in Hong Kong. Before the outbreak of the protests in 2014, as the OCLP consultation group held a non-binding referendum on mass civil disobedience later in the year, denunciations of the vote by Beijing state media (Chan, 2014; Davis, 2015) coincided with heavy DDoS attacks on the server infrastructure used to hold the vote (Makinen, 2014). Within Hong Kong and mainland China, online discourse about the protests was heavily surveilled. On the mainland side of the border, heavy censorship was used, while on both sides of the border, teams of pro-government netizens (some allegedly paid 50 cents per post and thus named the "Fifty-Cent Party" 五毛党), pressed a pro-government line in an effort to divert or drown out pro-protest messages (Hui, 2015; Tsui, 2015).

Scholars have also highlighted the significance of communication technology in the Umbrella Movement. The movement involved a "praxis of information" with young people serving as "agents of mediatization" (Lee & Ting, 2015) Using mobile technology and social media, young and media-literate protesters initiated, organized, and mobilized collective actions providing "an infusion of autonomy and grassroots energy" (Stacey, 2015) in an "insurgent public sphere" (Lee et al., 2015). Noting the failure of the Umbrella Movement to accomplish its stated goal (the establishment of universal suffrage for all Hongkongers) and the limitations of collective action, Kurata (2015) found that while there remains broad support for universal suffrage in electing the Chief Executive, Hongkongers remain divided over the question of Beijing's role in pre-selecting candidates. Hui and Lau (2015) proposed that a new *realpolitik* has emerged in Hong Kong and disrupted public political discourse.

Along these lines, Lam (2015) argued that the period since the Umbrella Movement has been characterized by political decay and a general weakening of the capacity of Hong Kong's government. Yuen (2015) also found that Hong Kong's political future is uncertain, with a citizenry still divided over how the territory should be governed. And in her study of the underlying political forces, Victoria Hui (2015) predicted that the failure of the movement would lead to renewed social tensions and future protests against the local Hong Kong and central Beijing governments.

Our study will build on this literature in the following ways. We pay particular attention to the primary digital platforms (WhatsApp and Facebook) used during the Umbrella Movement, while also discussing other platforms (WeChat, Firechat, and others) that played roles in the protests. We examine the places where most of the digital contention occurred, including semi-public venues like Facebook, as well as private chat groups, and the ways in which digital discourse broadened the landscape of digital activism both in Hong Kong and in a broader Greater China context. We also highlight the importance of protest leaders in the Umbrella Movement's communication on social media. Whereas many studies emphasize "leaderless" social movements (e.g., Boler, Macdonald, Nitsou, & Harris, 2014; Castells, 2012; Western, 2014), the Umbrella Movement had visible leaders who played critical roles on social media, had distinct public personae on social media, and in some cases were "native" to social media. Platforms like Facebook and WhatsApp functioned differently for different users. Many Hongkongers use Facebook for public or semi-public communication, but also to stay in touch with smaller groups of family and friends. WhatsApp offered limited public-facing opportunities for individuals, but had similar small-group sharing function. For average users who may have been the target of persuasion, many influential memes, and much influential information, traveled through networks of trusted contacts on social media already known in real life. For these purposes, Facebook and WhatsApp served overlapping purposes for average citizens monitoring the protests. For those directly involved, especially protest leaders, WhatsApp and other chat apps offered discreet logistical coordination or

communication with journalists, while Facebook was used as the main first platform for many public pronouncements and statements. For protest leaders, there was a clearer differentiation of functions: encrypted chat apps for interpersonal tactical logistics, and Facebook for public pronouncements about policy, and, occasionally, for interacting with crowds during tense moments (e.g., a standoff with police). For ordinary Hongkongers, mobilization might come via a general Facebook post, Facebook or WhatsApp content shared by trusted friends or family, or even via television, the medium in which older and fence-sitting Hongkongers first saw images of the tear gas that mobilized them. For organization, ordinary protest participants might do some interpersonal logistics via chat apps, or be informed and organized by public Facebook posts directed at a particular protest zone by activist leaders. However, pro-protest content did not persuade everyone it reached; informants spoke of Facebook feeds, and family WhatsApp groups, being divided by "yellow ribbon" (pro-protest) and "blue ribbon" (pro-government) content.

As Lee and Chan (2018) note, a theoretical approach to the Umbrella Movement must account for differences between Hong Kong's social media ecology and that of other societies which have experience protest movements. Noting the distinct experience in Hong Kong, they point out that:

> The majority of the most important and relevant social media communication contents during the Umbrella Movement were inaccessible [to the general public]. Hong Kong citizens seldom used Twitter and similarly public-oriented social media sites. Rather, protesters used mostly Facebook and WhatsApp for communicating about the movement. The impossibility of accessing such privatized communications limits researchers' capability of tackling certain research questions, such as the exact ways social media helped ordinary participants to coordinate the occupation by themselves. (p. 23)

With this challenge in mind, we have focused our efforts on trying to identify the key players, understand their motivations and goals, examine the ways they used social media (including social networking sites as well as chat apps) in pursuit of these goals, and analyze the outcomes from their efforts. We found that interviews with these individuals gave us useful insight into the intentions and communicative processes of the Umbrella Movement, and an incomplete but still useful set of perspectives about the outcomes.

Methodologically, our use of in-depth interviews and direct contact with both leaders and supporters of the movement builds on the studies that have used focus groups (Lee & Ting, 2015), telephone interviews (Lee et al., 2015), and online surveys (Lee & Chan, 2015). In addition to in-depth interviews, we also draw on reporting notes in Hong Kong, access to social media feeds, and personal conversations with many Hongkongers who were not key leaders in the protest. These other sources provide us with a wide set of perspectives on the protests. Finally, our article contributes to the literature by looking back at the protests with the benefit of hindsight.

Conceptual Framework

In light of digitally coordinated protests that have taken place around the world in recent years, scholars have sought to understand the role and significance of social media in these protests. In their seminal work conceptualizing connective action, Bennet and Segerberg (2013) emphasize the importance of individuals sharing "personal frames" as part of a larger, kaleidoscopic movement. Importantly, they develop the concept of "power signatures" to explain "the degree to which recognition (prestige and influence) is concentrated or dispersed among actors in a network" (p. 152). They also outline a perennial challenge for protest movements: sustaining initial enthusiasm over time. Writing about Occupy Wall Street, they note that "fundamentally different ideals and ideologies of organisation and action" arose over online communication strategies (p. 200). For Morozov (2009), social media pose a threat to social movements, in the form of "slacktivism." This involves online activity that satisfies individuals' urges to speak their mind, but does not translate into real-world outcomes. Questions about online and offline activism have a particular significance for authoritarian regimes: the work of Howard and Hussain (2013) emphasizes that even in repressive contexts, social media and mobile communication can "alter the capacity of citizens and civil society actors to affect domestic politics" (p. 66). Most recently, Tufekci's (2017) book on the power and fragility of networked protest explores the differentiated movements of the Arab Spring, Occupy Wall Street, and Gezi Park. Drawing on her studies of these movements and her extensive experience with protest movements (cf. Tufekci, 2014; Tufekci & Wilson, 2012), Tufekci finds that "networked protests have strengths and weaknesses that combine in novel ways and do not neatly conform to our understanding of the trajectory of protest movements before the advent of digital technologies" (p. xxiii).

Building on the literature described above, this article emphasizes three concepts in digital activism: mobilization, organization, and persuasion. While the literature above uses a range of terms to describe the goals of social movements, we find that these three broad terms are useful in grouping the digital activities of social movements, especially in cases where there is a clear leadership that directs communication in a coherent and strategic way. Importantly, these terms grow out of the literature's emphasis on what protest leaders seek to accomplish via social media activism. They are meant to highlight protest leaders' intentions and the communicative processes they undertook in pursuit of organizational goals. By focusing on the interplay of actors in the Umbrella Movement and the communication technology they put to use, we seek to add to scholarly discussions about power dynamics in large-scale protests, and

about the role of the state on social media networks and in emerging media broadly.

This article defines digital contention as a robust and public disagreement about future political reform, across multiple platforms and involving multiple stakeholders, that draws local and international attention and requires a government strategy in response. This style of contention, with multiplatform political debate and physical street protests, has been rare in mainland China since 1989, and was historically unprecedented in scale in Hong Kong.

We define other terms as follows: by *mobilization*, we refer to the ways that participants of members of the movement used social media to motivate activists and would-be activists to add their physical and digital efforts to the protest. By *organization*, we look at the ways that participants of the movement—a kaleidoscopic entity comprising numerous activist groups with shifting agendas—used social media to gauge participant sentiments and plan strategically to increase pressure on the government. And by *persuasion*, we refer to the ability of the Umbrella Movement to achieve and sustain popular support beyond the movement, among ordinary citizens not involved in the protests.

These three concepts articulate the objectives that protest groups seek to advance through their use of social media: mobilizing supporters to turn a spark of popular discontent into a popular movement; then, once mass protests are underway, organizing and channeling popular energy toward specific political objectives; and, finally, using social media to persuade enough skeptical citizens, adversaries in government, and influential actors such as the global media, of the justness of protest's cause, necessity of its demands, and validity of its civil disobedience methods. Combined, these three concepts highlight the role—as well as the persuasive limitations—of a centralized leadership in the Umbrella Movement. Moreover, we see the Umbrella Movement as a suitable case to test these three concepts because it had a clearly defined leadership that used social media to achieve the goals of mobilizing, organizing, and persuading Hongkongers. Thus, this study allows us to reflect on what the movement achieved relative to its leaders' stated goals.

Methodology

This project uses 40 in-depth interviews (in English, Cantonese, and Mandarin) with key participants in the protests, conducted in July–August 2015 and January 2016. Interviews on digital activism focused most on its main practitioners, the younger protest demographic that heavily supported the 2014 protests and used social and mobile media to discuss both tactics and fundamental political strategy. Interviewees included leaders of Occupy Central, Scholarism, and other groups; anti-Occupy organizations; reporters who covered the protests using social media; and local coders, researchers, and journalists who have since archived, mined, and visualized data about the debates. We also draw on reporting notes in Hong Kong, access to social media feeds, and personal conversations with Hongkongers who were not key leaders in the protest.

Most interviewees we initially identified were willing to speak on the record; likewise, the interviewees cited in this article have agreed to be named. Exceptions were made for certain individuals who played an observer role (such as local and international journalists) to allow them to speak candidly.

Our interview questions emphasized how participants used social media, the ways that this usage followed and differed from prior practices, and their thoughts on how other participants, including political adversaries and observers such as journalists, used social media, and how that usage compared with their own. We compared parallel narratives of similar events from the perspectives of various participants, and the contemporaneous social media record, to understand how these dynamics played out from different perspectives; we then synthesized these multiple viewpoints into an overview for analysis. We recorded all interviews and coded them using Dedoose, with common themes arising as we read, reread, and highlighted points made by interviewees (Agur, 2015; Belair-Gagnon, Mishra, & Agur, 2014; Saldaña, 2018).

Our qualitative research results were checked against the notes, recollections, and sources in the professional network of one of the paper's authors, who was a journalist focused on Hong Kong during the period of time in question. One of the authors has worked as a reporter in Hong Kong in both global English and local Chinese-language media, and was a member of many of the pivotal social media groups during this period of time; he was in contact with participants during all stages of the movement, from its solely digital prelude to its occupation of the streets. Besides observation of social media online, he also sat with participants face-to-face, over meals and tea, as they demonstrated their social media methods from a user's point of view.

From Digital Activism to Civil Disobedience

We have inductively identified ways that interviewees claimed they used social media to mobilize, organize, and persuade. Broadly speaking, Scholarism and local university students used Facebook and mobile chat apps (primarily WhatsApp and Facebook Messenger), and more rarely, email. OCLP were more responsive on email, and initially emphasized traditional media (newspaper columns, etc.), but soon adapted to the media needed to reach younger protesters, and built a savvy multiplatform media operation. Meanwhile, journalists from legacy media found their way to younger people once they became key players in the main news narrative. Legacy media operations, especially those identified with centrist or pro-Occupy positions (*Ming Pao Daily News; Apple Daily*) built out robust social media operations, and

Apple Daily in particular specialized in viral memes. Also, the pro-government side eventually began adapting digital-first messaging tactics; thus, over the course of the protests, all actors gained some proficiency across platforms.

Mobilization: Sparking and Sustaining the Occupation

As noted above, by *mobilization*, we refer to the ways that members of the movement used social media to motivate activists and would-be activists to add their physical and digital efforts to the protest. The Umbrella Movement encompassed several citizen protest movements and groups (including OCLP, Scholarism, and the Hong Kong Federation of Students) that became influential actors in protests occupying areas of central Hong Kong in 2014. Before the movement began, all major actors maintained some presence on Facebook, (in the form of personal pages, and professional individual and institutional pages for general communications) and WhatsApp (for targeted group and individual communications). This pre-existing use of social media was most pronounced among younger protesters, but also true of older academics and lawyers prominent in the lead-up to the protests. Before the protests, starting in early 2013, OCLP publicized, and solicited public participation in, a long process of civil consultation to decide on the course of the movement. Strategies included public consultations, soliciting opinions online, and an informal "civil referendum" on political reform in which nearly a million Hongkongers voted. This nonbinding, unofficial vote was seen by Beijing authorities as influential enough to merit formal denunciations from Chinese state media, as well as sustained cyber-attacks.

In August of 2014, the National People's Congress in Beijing announced its restrictive plan for Hongkongers' voting rights for the Chief Executive, sparking a backlash. Protesters gathered in government buildings near Admiralty through September. In late September, a police decision to use tear gas on protesters produced shocking images that quickly spread across social and legacy media, and brought many previously apathetic Hongkongers into the streets.

As the protests ignited and evolved, participants tried new tools. These included Firechat (briefly popular during rumors of mass signal outage, due to its Bluetooth mesh connectivity, but then rarely used in practice), Telegram (similar to WhatsApp but with more robust security features), Twitter (largely restricted to foreign correspondents), and WeChat (a chat app used worldwide, but created by a mainland Chinese firm and thus more exposed to Beijing's media censorship and surveillance apparatus). Activist leaders also tried mobilization tools of differing costs and scales. An interviewee noted that it was difficult to predict what would gain traction. For example, despite its high production value, "A love letter to Central" did not immediately catch on and its producers were surprised when they observed more interest in "lower quality" content, often user-generated.

Facebook was the default public medium for most participants on all sides. The platform already has high penetration in Hong Kong, meaning that breaking news of social disruptions (from both news sources and affected individuals sharing their experiences) often first got to Hong Kong news consumers through their Facebook timelines. Many protest groups, especially those with younger, student-oriented constituencies and leadership, generally released statements and news on Facebook by default, and only later (or never) by email and legacy media.

Mobile chat apps, mostly WhatsApp, are used by many Hongkongers to communicate with small chat groups of users from family, school, and other real-life social institutions (interview with BBC journalist). When the protests began, pre-existing chat groups with no prior political function (e.g., a group of school alumni) were often taken over by political news and debates. Activists, meanwhile, created new special-purpose groups to mobilize supporters and inform the media. Protest leaders adopted Telegram for sensitive discussions, and developed guidelines for sensitive deliberations, best conducted in person with phones stored in another location to protect against surveillance.

Protest leaders, especially younger ones, prioritized Facebook and mobile chat apps, rarely or never getting around to using email or Twitter. They generally did not craft a systematic legacy media communications strategy (emails, press releases, phone calls) to reach out to global media, most of whom were already physically headquartered in Hong Kong and could be easily contacted using dedicated WhatsApp groups for journalists. At the moment of mobilization, a digital activism discourse that had been largely limited to politically committed netizens and perennial protest figures shifted to a broader section of the population, making an unexpected impact on Hong Kong's urban and media landscapes.

Organization: Strategic and Tactical Communication

As defined above, *organization* encompasses the ways that the movement participants—a kaleidoscopic entity comprising numerous activist groups with shifting agendas—used social media to gauge participant sentiments and plan strategically to increase pressure on the government. With protests firmly underway and occupation sites established, legacy media played little role as tactical platforms for on-the-ground developments. Social media was critical to, for instance, massing protesters in a certain area to deter a police charge, or mobilizing lawyers to defend and bail out arrested protesters. However, newspapers, television, and radio remained an important arena for communicating with the vast majority of Hong Kong citizens. Protest leaders would discuss longer term strategy and policies in op-eds, television and radio interviews, and other legacy media formats. These legacy media engagements came after both tactical

decisions and narrative formation had shaped protestors' political posture within the stratum of social media. Joshua WONG, for instance, gave numerous TV interviews, and wrote columns in newspapers like *Ming Pao Daily News* and *Apple Daily*; unusually, these columns sometimes came out before any parallel statement on Facebook or another platform, since an exclusive first printing of a policy op-ed pays some author fees.

In some instances, prominent protest voices that first came to public attention and became influential actors in digital activism on social media platforms, later became prominent voices in legacy media as well. Others remained mainly "Internet famous" during and after the protests, becoming leading voices for digital activism among protest sympathizers, but little known to the broader Hong Kong public. While these individuals did expand the landscape of digital activism in Hong Kong, rising from pre-protest anonymity, they often contributed to the "echo chamber."

To press their case, protesters often created viral memes designed to create momentum around a particular interpretation of events. These were easily shareable on Facebook and WhatsApp (to reach immediate participants, mostly younger), bolstering a narrative that was often later echoed by legacy media outlets (which reach older audiences). Protesters also used social media to fight back against perceived mainstream media misrepresentations of protest actions and motives (e.g., disowning the actions of a radical splinter group of protesters who used violent methods to break into a government building).

The creation of memes and intensive, street-level coverage driven by robust multimedia was taken up by a number of digital-only, non-legacy media outlets (e.g., D100, TheStandNews) and citizen-run journalistic platforms (e.g., Social Record) that typically maintained presences on standalone websites, Facebook, and sometimes separate smartphone apps, usually pushing out content on all these platforms near-simultaneously. The sudden growth in demand for political news and commentary, and the public desire for near-simultaneous information from multiple protest sites around Hong Kong, spurred the growth of many citizen-run news outlets, nearly all digital. Many of these outlets have continued to operate and provide news, even those not persuaded of validity of the tactics and objectives of the Umbrella Movement. These outlets have established functions in a media environment in which digital activism, and potential civil disobedience, is a more legitimate possibility than it was before the protests.

Interviewees spoke about the importance of late-night (9 pm onward) posts on WhatsApp, Telegram, WeChat, and Facebook and the comparative unimportance of early morning posts. Two interviewees pointed out that a power law developed among participants, with a significant percentage of the most forwarded and favorite content originating with a relatively small number of participants. When, for example, a group of these major players had dinner together and put away their smartphones, social media activity declined sharply. As one interviewee told us, "there was exactly as much happening on the street as usual, so there was no real drop off in news. The only difference was that there was less happening online."

While Hong Kong's resident foreign journalists made heavy use of Twitter covering the protests, the platform is not widely used among Hongkongers themselves. Rather, it played a substantial role in local leaders' attempts to keep foreign media informed and shape a favorable narrative. Occasionally, protesters pushed unflattering storylines about the authorities in the foreign press to raise pressure on the Hong Kong government, which values its reputation as a competent manager of a global finance hub. Protesters would then spotlight this unflattering foreign coverage in viral content aimed for local Hong Kong audiences, with sarcastic slogans like "揚威海外," "strutting our strength on the world stage!" However, despite these exceptions, Twitter played a minor role and was largely neglected as a routine social media tool for top-level protest leaders; for instance, the Twitter feed of Joshua WONG automatically relayed his Facebook posts exclusively. Foreign correspondents noted that WONG and other protest leaders were rarely responsive to Twitter DMs (direct messages) or email, generally replying only to messages on WhatsApp or, preferably, encrypted channels such as Telegram.

From the beginning, leaders of the Umbrella Movement saw social media as both an effective tool of disruption and a necessary alternative to legacy media, seen as generally skeptical of the movement. Unlike Occupy Wall Street, for example, the Umbrella Movement consciously embraced a hierarchical model of communication as a means of remaining organized and focused. The movement had a clear set of leaders who directed official communications on social media, served as spokespeople, and led the movement's upper level decision-making via encrypted channels.

Initially the movement was able to achieve an impressive level of message unity, bringing together a differentiated and dispersed set of participants in physical gatherings for unprecedented acts of digital activism and civil disobedience. As the movement progressed with little sign of concessions from the Hong Kong or Beijing governments, its agenda-setting power lessened and it became more reactive, as opponents (largely the Hong Kong and Chinese governments and their proxies) became more assertive on social media. Pro-government figures such as Robert Chow became savvier users of social media platforms, attempting to craft viral content appealing to younger users. When the occupation was cleared by police in December of 2014, many protesters felt that their extreme connectivity became a liability: comment sections on platforms like Facebook became highly contentious within the movement, with harshly worded recriminations directed at fellow protestors as various factions within the movement assigned blame for tactical and strategic failures.

The Challenge of Persuasion: Fractured Discourse and the Legacy of the Umbrella Movement

As previously defined in this article, *persuasion*, refers to the ability of the Umbrella Movement to achieve and sustain popular support beyond the movement, among ordinary citizens not involved in the protests. Before and during the occupation, many Hongkongers were cautiously sympathetic to the political aims of the protests, but skeptical of civil disobedience as a form of public pressure. Protest leaders spent considerable effort attempting to shape a sympathetic media narrative to counter the government's negative portrayal of the protests, crafting statements posted to Facebook, and creating viral memes that would resonate sympathetically with average Hongkongers not active in the protests. Social media practitioners, especially younger protest organizers who were "digital natives," were initially optimistic that social media might provide avenues for persuasion that legacy media could not. Many Hongkongers use social media, such as the chat groups on WhatsApp, to communicate with trusted groups of family, friends, and professional peers. In principle, messages—including about politics—conveyed through these personal channels have a higher chance of being viewed as credible by its recipients, compared with the anonymity of a radio or newspaper advertisement. A series of semi-private chat app groups in various languages also gave the protest leaders immediate access to local and foreign reporters, while viral social media content was created to rally sympathizers and, to a lesser extent, persuade the unconvinced. As the protests developed and protest leaders appreciated the need to persuade skeptical Hongkongers, especially older demographics whose main news sources were legacy media, protest leaders moved to supplement their digital-first social media content with more conventional legacy media outreach such as television appearances and newspaper op-eds.

Interviewees, especially those with considerable overseas experience and language skills, said they spent a significant amount of communication aimed at foreign audiences. Several pointed out the importance of certain media spaces (e.g., Twitter) and practices (e.g., writing in English) for attracting scrutiny by international media, activists, and governments.

At the same time, as the debate involved people around the world, it also took on hyper-local characteristics which were unprecedented in Hong Kong's history of digital activism. This included high levels of linguistic and cultural specificity and local dialect and script usage that proved opaque not merely to English-speakers, but also to many Mandarin-speakers as well. Even for Hongkongers not persuaded by the movement's political objectives or protest tactics, this organic emergence of locally particularistic discourse, which relied on specialized local dialect characters, elaborate puns, esoteric arcana, and other cultural insider references, became a powerful assertion of a particular local Hong Kong identity.

Interviewees described how neighborhoods in Hong Kong participated in divergent ways. For example, the data from the major Admiralty protest site on Hong Kong Island, which attracted more educated and affluent professionals, differ sharply in content from the data from Mong Kok, a working-class neighborhood. A related dimension was the continuation of pre-existing online communities—especially gamers—in participating in the debates. For instance, long-standing communities on Hong Kong online fora, such as Golden Forum 高登討論區 (a Hong Kong site similar to Reddit), became significantly active in the protest movement, debating and influencing real-life events. These communities both followed and cut across geographical lines; while less sophisticated or civil threads on Golden Forum were identified with the Mong Kok protest site, others covered themes relevant to multiple sites.

Interviewees also identified different types of social media "space" in terms of gradations of publicness, where the tone and type of digital activism varied. For example, certain platforms/apps (Twitter and Facebook, for instance) were deliberately public. Others were semi-public, such as WhatsApp groups of varied sizes, some for a small group of friends, others for a major civic organization or school alumni group. Others were deliberately private and intended to be more secure (Telegram). And others were somewhere in between (Firechat, Snapchat), depending on user practices. Often, previously apolitical spaces were politicized; family and school alumni chat groups became sites for digital activism, ranging from passive meme-sharing to robust and relationship-straining debates.

With low barriers to entry and new agency for users, and many new users joining the digital conversation on Hong Kong politics, divergent discourses became a major feature of the Umbrella Movement. Several interviewees highlighted the ways that the debates split between legacy and social media. TV has a large audience and legitimacy among older and less educated Hong Kong citizens; for many Hongkongers, newspapers remain a serious prestige format whose authority extends to social media issued under their imprimatur (e.g., a newspaper's Facebook feed), while social media without a legacy media connection is suspect.

The debate was also fractured by a split *among* social media platforms and apps. Interviewees who had been active in the Occupy movement described social media discussions as silos or echo chambers. Much of the conversation reinforced in-group bonds (by "rallying the troops") but did little to persuade those beyond the group. Leaders of the Occupy movement, such as its founder and figurehead Benny Tai, said that on social media, it was difficult to sustain unity beyond an initial mobilization. At the beginning of the protests, prominent opponents of the movement often advanced their favored narratives, unflattering to the protesters, through legacy media; as the protests continued and the media landscape evolved, however, media-savvy opponents planned, created, and promoted new social media channels

for anti-protest content that traveled outside legacy media, meeting protesters on their own digital turf. Given that, to be more successful, the movement had to not simply rally the converted (already younger and more digital-native), but also persuade older, less committed citizens, social media, as a significant cross-general point of contact for Hongkongers, might have made a unique contribution to this stage of persuasion. For example, a younger person in a WhatsApp group with older relatives might have had a more significant impact than a newspaper op-ed by a protest leader. That this did not conclusively happen showed the limits of social media as a vector of persuasion in this instance.

The arrival of social media has offered an alternative set of formats and narratives, but legacy media remain paramount in Hong Kong's politics. While those involved in the protests operated on a different sense of temporality, legacy media continued to provide traditional daily (newspapers) and hourly (TV and radio) updates with wider readership and viewership than all but a handful of posts on social media. Interviewees conceded that many—perhaps most—older, less educated, and professional people who followed the protests did so according to the periodicity of legacy media, not the minute-by-minute rhythms of the key participants' social media activity. Movement leaders' absorption in the constant minutiae of social media management may ultimately have been a hindrance to the broadening of the movement beyond its initial support base. And there was a disconnect in terms of age and education. As one protest leader remarked, "We knew that by using FB and other social media, we would lose the battle with older & less educated people. I don't think we were successful in reaching less educated people."

Interviewees pointed to the difficulty of undertaking disruptive civil contention in a society in which the law is generally held in high regard and civil disobedience is frowned upon. Before the protests began, Occupy opponents such as Robert Chow made dire predictions for the negative social and economic consequences of the Occupy movement. Ultimately, the movement proved to be relatively peaceful and orderly, as evidenced through exhaustive documentation in contemporaneous social media, creating an accessible, instantaneous template for civil disobedience among a population for which such mass rule-breaking was once difficult to imagine. In this respect, the Umbrella Movement, by both occupying critical physical spaces and exhaustively documenting the occupation in digital spaces, broadened the acceptable and imaginable range of digital activism in Hong Kong politics, and provided a rare example of bloodless mass protest on Chinese soil.

An additional factor is Hongkongers' acute awareness of the ways in which civil discourse is restricted in mainland China. The Central Government is developing sophisticated tools for granular, platform-level censorship as a more nuanced and market-friendly alternative to wholesale blocking of particular services, or even simply sensitive keywords. This fine-tuned censorship system does not operate in Hong Kong, yet it fits a pattern of repression that feeds Hongkongers' anxieties about local political reform under the sovereignty of the People's Republic.

Many leaders of the Umbrella Movement were closely attuned to how effective certain kinds of communications were for shaping the opinions of, and rallying the support of, the crowds. In that sense, interviewing movement leaders gave a sense of how political communication through social media acted in a larger social field. Yet in some cases, when protest leaders misread the mood of rank-and-file protesters, they faced discontent on social media. Thus, protest leaders' use of social media was not a one-way conveyor belt of information, but, instead, included feedback mechanisms to steer leadership decisions and signal when protest leaders seemed to diverge from the will of the crowds.

As protest leaders sometimes struggled to manage their communication, they faced an increasingly savvy set of opponents on social media. One interviewee recalled that the government became "Very smart with WhatsApp and WeChat. They sent stories, written by professionals to sound like regular people, discussing how Occupy caused problems around HK. They used layman's terms very effectively, including lots of 'housewife language' to connect with people." Using constructed "authentic" voices, opponents of the Umbrella Movement portrayed the protests as needlessly disruptive and disconnected from the daily struggles of ordinary people.

Public opinion polls since the ending of the physical occupation, cleared by police in December 2014, suggest that the movement's leaders did not ultimately succeed in preaching to the unconverted, and had not created a durable social consensus about the urgency of, and appropriate methods for addressing issues arising from, Hong Kong political reform. A March 2015 poll, held shortly after the protests' conclusion in December 2014, found that 39.6% of respondents indicated that the "Occupy Movement" had a "negative" (very negative/somewhat negative) impact; 31.0% of respondents indicated "positive" (very positive/somewhat positive) impact; 26.4% indicated "so-so" (Centre for Communication and Public Opinion Survey, 2015).

This poll backs up what many activists articulated in interviews: yes there was a good deal of polarization, but at the same time, many Hongkongers were fence-sitters. They were not enthusiastic or trusting about Beijing's rule over Hong Kong, nor were they persuaded by the Umbrella Movement's tactics or political manifesto. Given that political news traveled through family or social digital spaces which reflected real-life relationships, there was a notable lack of persuasion either over the Internet (not a surprise given the sharp polarization of Internet discourse related to the movement) *or* among people who knew each other in real life but communicated online.

While interviewees were frank about the limitations of the movement in persuading skeptical audiences, interviewees also pointed to a range of successes in building the infrastructure

and habits of robust digital activism, and creating templates that may be useful for future political mobilization. While most Hongkongers ultimately did not find the movement persuasive in articulating the rationale of its objectives and methods for its tactics, the most dire predictions of economic and social disruption also did not come to pass, and protesters were able to publicly perform a relatively clean and orderly act of civil disobedience on a scale unprecedented in Hong Kong's history. The movement's modest successes in drawing local Hong Kong politicians into contentious discourse (including televised debates with protest leaders), and creating a new set of symbols, memories, and digital groupings for politically interested Hongkongers, especially among the youth demographic, suggest an expanded landscape for digital activism in Hong Kong in the future. Divisive political events—such as the 2018 trial of Chan Kin-man, an academic and Umbrella leader who was one of our informants, on charges relating to his Occupy leadership—continue to draw attention from protest leaders in Hong Kong. These protest leaders have sharpened their strategic digital tools for coordinating responses to such events, even if their digital and real-life protest scripts have had limited success persuading the unconvinced.

Conclusion

This article has used a qualitative study, drawing primarily from interviews with leading social media practitioners in a large-scale protest movement, to understand the intentions, communicative processes, and outcomes of that movement's use of social media. Throughout, we sought a range of perspectives, including members of different factions and groups who often disagreed with each other about end goals and the appropriate strategies. The breadth of our interviews thus helped us overcome some of the limitations present in qualitative analysis. That said, one of the challenges of studying the communication of a large, multifaction, multisite protest is the sheer volume of correspondence—much of it private and thus difficult to access. Our approach—interviewing the key participants—had the advantages of providing access to much of the strategic and tactical communication by the movement's leaders, and offering both a play-by-play of certain key moments and useful context for these moments.

This article explored digital activism in a particular context (urban, high-tech, affluent, and geographically limited), by a movement that sought to promote political change within a regime, rather than to replace that regime. Participants in the Umbrella Movement sought to reach potentially active demographics where they already live their lives—primarily in this online discourse, much less in legacy media. Beyond the overarching political objective, the movement's desired outcomes included (a) effective mobilization and coordination of protest supporters in the physical space of the protest zones, (b) using digital platforms as a means of seeking consensus about key decisions for the protest movement, (c) attempting to keep a media spotlight on their cause and persuade persons beyond immediate supporters of the validity of their cause, and (d) establish, with "keyboard warriors," a strong digital presence to put the democracy movement case forward to skeptics inside and outside Hong Kong, and, if necessary, push back against negative discourse about the protest movement, including negative chatter incited by paid pro-government commenters (so-called Fifty-Centers or 五毛党).

Of these desired outcomes, the Umbrella Movement achieved (a) some success in tactical coordination and blocking police advances for a period of several weeks, (b) little success forging a long-term political consensus within the movement, (c) limited success keeping protests in the global media spotlight and a concurrent loss of urgency in coverage of local media, and (d) political failure, as the movement became divided by toxic recriminations, while the government did not concede on the protestors' key demand of electoral reform, which confirms some of the literature on connective action (cf. Bennet & Segerberg, 2013).

Thus, how did protest leaders in Hong Kong's Umbrella Movement use social media as a component of digital activism during the 2014 protests, and what unique dimensions of this contention did their social media usage add to the movement? In Hong Kong, social media allowed a large-scale protest to mobilize and organize its demands with diverse and dispersed audiences. Although the movement began with digital methods of mobilization, and though the pre-tear gas protests in September were young people mostly online, the critical tipping point for the protests came when images of tear gas broadcast out to ordinary Hongkongers who were not actively engaged in this online discourse. That moment, which is not mainly attributable to social media, spurred the mass occupation. Thus, digital activism on social media started the movement, but did not have this catalytic effect at the moment where the movement moved from a fringe event to a mass event. For short-term tactical maneuvering and constant information-sharing, social media were essential. Slower term policy discussions might occur over legacy media—including television and newspapers—but Facebook and mobile chat apps became the critical media for those physically in the protest zone, as well as those physically outside the protest zone who followed the movement.

But the Umbrella Movement was less successful in its efforts to persuade audiences outside the movement. Beyond the initial moment of unity, when it brought together different groups in a focused effort to defeat a government plan, it struggled to sustain what it had established. And as the weeks passed and protests continued, the movement failed to subvert existing hierarchies and political networks in Hong Kong. For scholars of communication, the movement allows for a richer discussion about the reasons that protest movements use social media, the ways that factions within a movement can diverge in their approach to social media. It also suggests the limits of movements that are unable to translate a robust digital discourse of digital activism, and

even mass physical disobedience, into political concessions or direct access to power.

To what extent did this social media usage lead to successes in organization, mobilization, and persuasion beyond the Umbrella Movement? This shows how digital debates in partial democracies or authoritarian systems can take on a vicarious political function: discussions on social media fill the place of debates that might otherwise occur within the framework of a fully representative political system. The protest movement shifted digital activism—which previously played out mostly in legacy media and in the streets and political bodies—*to* social media platforms in a significant way (which would not have been possible in mainland China). But it did not make that discourse more persuasive for audiences outside the movement, or sustain enough influence to achieve the stated political objectives of the protests.

The Umbrella Movement may not have persuaded an enduring majority of Hongkongers that their movement and tactics were valid or wise, but the existence of social media allowed protest leaders to document their motivations and conduct and avoid the tarnish of the least flattering narratives in legacy media. This preserves the movement's reputation if further repressive government actions in the future radicalize Hong Kong moderates who wish to preserve their freedoms while not actively antagonizing Beijing. By creating this discourse on social media, the original protest movement created an audience, a template, and clear rallying points for a potential future protest. Perhaps the most critical shift affected by the protests was shifting the definition of "digital activism" and broadening its acceptable range of expressions.

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