The Conventions Won't Matter, But the Debates Might
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The endless campaign, also known as the 2012 American presidential election, isn’t quite ending yet. But as Churchill might have put it, we have at least reached the beginning of the end.

With less than 90 days until Election Day, the party conventions are almost upon us and the fall debates not far behind. The respective party conventions will take place in late August and early September. Traditionally, the presidential debates are held in October.

But will either the conventions or the debates matter in this persistently tight race? So far the equivalent of political dynamite has failed to move the numbers significantly on either side—not hundreds of millions of dollars worth of negative ads, not the much-awaited Supreme Court decision on the Affordable Care Act, not Romney’s widely reported “gaffes” during his recent trip abroad, and not even the mixed news on jobs and economic growth.

It’s possible that the race will end this way, a tight battle all the way to November with razor-thin winning margins for the eventual victor. Certainly America has had its share of presidential nail-biters recently, including the 2000 and 2004 elections. But it’s equally possible that either the conventions or the debates could break open a close contest. Both have done so in earlier elections, but neither has consistently done so election after election.

When conventions have been influential, the cause has been the well-known convention “bounce”—a sudden, sharp surge of support reflected in post-convention polls for the newly nominated presidential candidate. Bounces usually occur in the afterglow of a harmonious party convention. While not uncommon, they are also rarely decisive influences on the fall race.

Only two candidates since 1964 have had no bounce: George McGovern in 1972 and John Kerry in 2004 (Gallup Polls), both of whom lost. But the bounce is not a reliable indicator of who will win. In 2008, McCain had a larger bounce than Obama, but Obama went on to an easy victory. Even less oracular was Barry Goldwater’s five-point bounce in 1964, compared to LBJ’s three-point one. Johnson went on to the largest percentage victory in American history.

Bill Clinton’s bounce in 1992 was one that counted. He received a whopping 16-point bump after the convention (Gallup), giving him a lead over George H. W. Bush and Ross Perot that he never relinquished.

So some convention bounces matter, while most do not. This year seems destined to be one that doesn’t matter. That’s partly because for the second straight election the party conventions occur in successive weeks, minimizing the effect of whatever bounce occurs. In 2008, under similar circumstances, Obama and McCain had relatively small bounces that didn’t much influence the race. 2012 seems likely to repeat that scenario.
But the October debates may be a different story. In fact, if we are to see game changers in 2012, it will be the debates. Historically, debates played that role in 1960, 1976, and probably 1980.

In addition, we know two critical things about presidential debates that suggest they could matter this year. One is that their target audience is undecided voters in key swing states, which this year amount to roughly 10-15% of likely voters. These voters watch debates, often intensely. And debates can and do influence their vote.

The other key fact about the debates is that the largest audience is always for the first debate, which is scheduled for October 3. Typically viewership steadily declines for later debates, suggesting that the first debate will be the most influential in helping voters make their decision.

So a group large enough to determine the election will be watching the debates closely, and the debates themselves will be early enough that they can significantly shift voter intentions. This sets the stage for a momentous confrontation between Obama and Romney.

The fall debates may not provide such a pivotal moment, of course. But it is hard to think of many other elections having more substantive issues, domestic and foreign, highly salient for voters. Moreover, as the earlier Republican primary demonstrated, a large number of voters are interested in debating these issues. Indeed, to the surprise of many, the GOP spring debates materially affected the outcome of that party’s nomination struggle.

So while the conventions in 2012 won’t matter much, the debates could. If they do it’s a relatively small group of voters in key states that will make the difference. And it’s a difference likely to occur sooner rather than later, providing a potentially decisive victory for one candidate or the other. That outcome might not be the worst thing for America in this time of anger, unrest, and growing polarization. A convincing win for either side might be the catalyst needed to bring the country together again.

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