

## The puzzle of the convention bounce

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Political conventions may not be as exciting as they once were--the days of late-night nominations on the tenth ballot are long gone, and the TV networks no longer bother with full coverage of these stage-managed events--but they still give nominees a jump of about 5 points in the polls.

Figure 1 shows the bounce as estimated during the decades that Gallup has conducted pre- and post-convention surveys. The candidate who throws the convention nearly always gets a jump in the polls, typically less than 10% (with the exception of 1992, when Bill Clinton's convention coincided with uncertainty about third-party candidate Ross Perot's presence in the race).

At first sight, this would seem to be no surprise: a candidate gets positive publicity, he and his supporters get to speak to a national audience and make their case, and some percentage of the voters are persuaded.

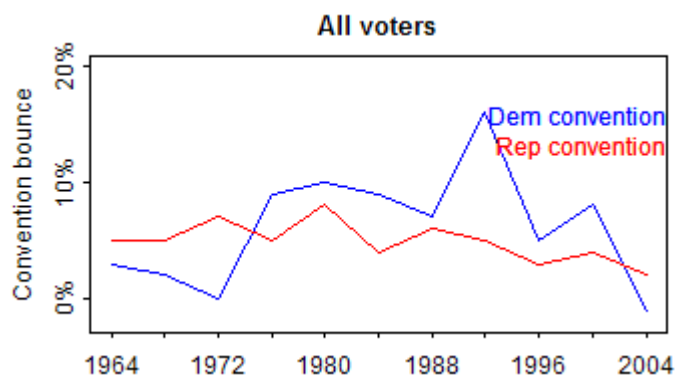


Figure 1. From Gallup polls: the shift in support toward the Democratic candidate after his convention, and toward the Republican candidate after his convention, in the past eleven presidential elections. The bounce is nearly always positive but appears to be gradually decreasing over time.

But from another perspective, the convention bounce is bizarre and even disturbing. You can pretty much predict what's going to happen during a national convention: some big-name politicians and a few newcomers will make speeches praising Mom, apple pie, peace through strength, unity through diversity, and some other political bromides. Maybe something about the family farm, the entrepreneurial spirit, and someone overcoming hardship to get where they are today. Maybe the convention will be as boring as Michael Dukakis's in 1988, maybe the TV viewer will get lucky and see something exciting like Barack Obama's "We coach little league in the blue states" speech in 2004 or Patrick Buchanan's "take back our culture" in 1992. But there's no particular reason to expect any revelations.

Put it another way. Suppose you asked a voter, one week before the Democratic convention, who he supports for president, and he responds, "John McCain." Now imagine saying to this voter: "Next week there will be a convention; some Democrats will make speeches and maybe he'll see part of it on TV. Who do you think you'll support in a week?" About 10% of the McCain supporters should say, "OK, I'll switch to Obama." But this doesn't make sense. Political conventions are, well, conventional. You might expect a net gain for the Democrats if they were to run a particularly effective convention--or a net loss if their convention were mishandled. But on average, why a gain? Shouldn't voters, knowing that a convention is coming, be able to anticipate it? If you support McCain now but expect to support Obama in a week, why not switch already (and similarly for changes in the other direction during the Republican convention)?

The answer is that, unlike stock prices which are supposed to represent the current value of a firm, or betting odds which will (in an efficient market) account for all available information, polls represent people's current frame of mind, and voters understand that they have time to make their decisions. From this perspective, a convention bounce does not represent anything impressive by the campaign but rather an opportunity for voters to move to where they will eventually go, based on their partisanship and political attitudes.

In figure 2, we break down the bounce to see what's happening among self-declared Democrats, Independents, and Republicans in each year. We use opinion polls taken before and after each Democratic and Republican convention since 1984. These were all the years for which we could find data for such surveys broken down by the partisanship of the people polled.

On average, the largest changes occur among Independents. This makes sense: the 20% or so of voters who identify with neither party are least likely to have already made up their mind and most likely to change their opinions. What is perhaps more of a surprise is that the bounces are, on average, of comparable size for both conventions: we do *not* see Democratic voters moving more to their party during the Democratic convention, or the Republicans shifting more during their party's. The conventions are part of a larger campaigning process by which voters learn about the ideological and policy positions of the candidates. What is relevant is the information conveyed rather than the momentary positions of the polls.

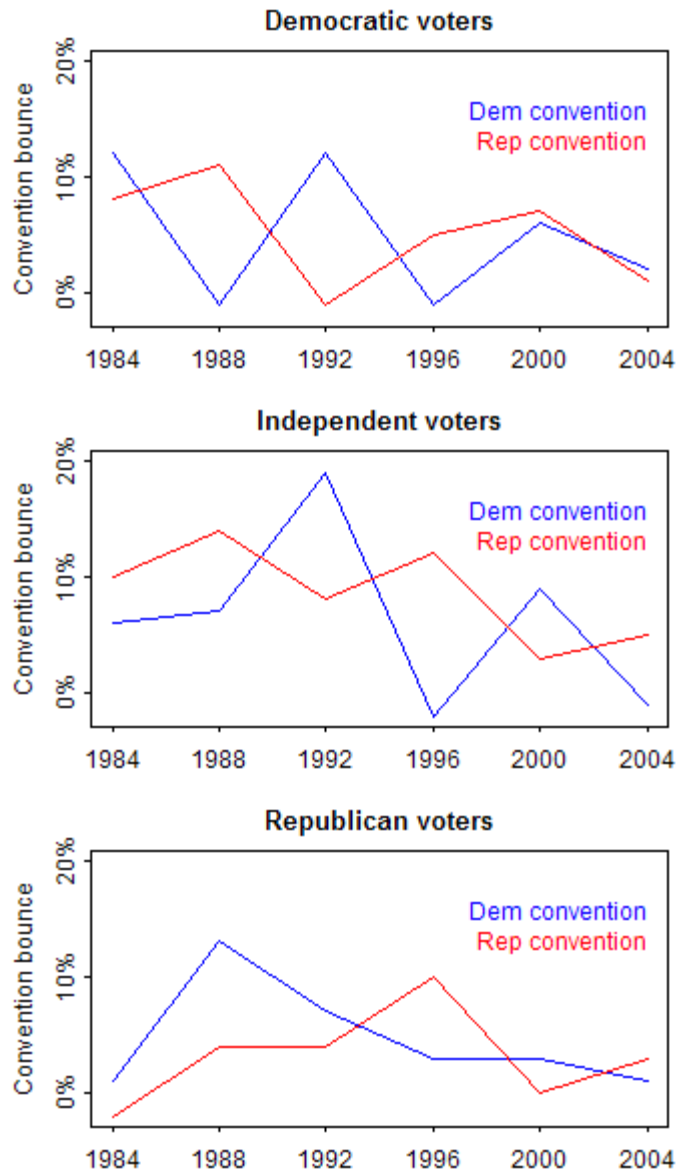


Figure 2. From national opinion polls: the shift in support toward the Democratic candidate after his convention, and toward the Republican candidate after his convention, separately considering self-declared Democrats, Independents, and Republicans. Sample size limitations make it difficult to interpret individual data points here, but we see two general trends: first, the convention bounce has been gradually declining; and, second, swings tend to be larger among Independents.

This is related to another question: Why do the political media seem so focused on horse-race coverage? For example, a Pew Research Center of the primary elections found that just 10% of news stories “explained how citizens might be affected by the election,” while over 80% “focused on matters that largely impacted only the parties and the candidates.” It’s commonplace among political scientists and leading political journalists that general elections for president are generally determined by fundamental variables, not short-term news or bandwagon effects--things are different for primary elections, which have multiple candidates and are inherently unstable--and so this horse-race coverage was a waste of time. Polling is also ridiculously frequent. Why is this all happening?

My theory, at least for the general election, is that most of the voters have already decided who they're going to vote for--and even the ones who haven't decided are often more predictable than they realize. Suppose, for example, that 40% have pretty much already decided they'll vote for the Democrat, 40% will vote for the Republican, and the fight is over the remaining 20%--most of whom do not follow politics closely in any case. Now think of the audience for political news. 80% of the people don't need to know the candidates' positions--they've already decided their votes--but they're intensely interested in the horse race: are “we” going to win or lose? Any substantive coverage is really just for 20% of the audience. So, from that perspective, it makes sense for the media to give people the horse race. (Yes, survey respondents say they want more of candidates' position issues and less on which candidate is leading in the polls--but I don't know that I believe people when they say this.)

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