

TO: Interested Parties
FROM: Gene Ulm
DATE: November 18, 2021
RE: Recent survey results detailing the relative effectiveness of media during Virginia's 2021 Gubernatorial campaign

The following summary is based on two surveys of 800 voters (1600 total interviews) completed in Virginia. Both surveys used a mixed-mode methodology that employed both telephone and text-to-web interviewing. The first survey was completed September 8-12, 2021 immediately following Labor Day. The second survey was completed November 2-7, 2021 immediately following election day. The margin of error on each survey is plus or minus 3.46%; differences that are the same or smaller than the margin of error are insignificant.

The surveys focused on the comparative impact of television, radio and digital advertising. Importantly the initial (September 8-12) survey was completed at a time when the Youngkin campaign had been purchasing radio advertising and the McAuliffe campaign had yet to advertise on radio.

Key findings:

- **In terms of reach, television advertising remains the king.** The September survey showed Youngkin TV advertising had 79% recall, while McAuliffe had 80% recall. By election day, these figures had jumped to 90% for both campaigns. The data also shows that both radio and digital advertising have comparable reach:

Recall of Advertising type (November 2-7)

	Youngkin	McAuliffe
Television	90%	90%
Radio	53%	52%
Digital	57%	57%

- **Our September 8-12 survey highlights the impact of Youngkin radio up against the ABSENCE OF McAULIFFE RADIO.** Our initial September survey gave us the unique ability to test Youngkin versus McAuliffe media head to head: The Youngkin campaign had been on radio while the McAuliffe campaign had yet to purchase.

The data suggest that Youngkin's radio was a key aspect of closing McAuliffe's early lead.

Media Recall	Ballot Lift (comparing the ballot shift of those who recall the media from those who do not recall)
Youngkin TV	3.95%
Youngkin Radio	7.03%
Youngkin Digital	5.46%

- **This September 8-12 study also highlights the relative impact of combined media for Glenn Youngkin:** Those who recalled seeing Youngkin TV AND hearing Youngkin radio polled 6.84% higher than those who did not.

Additional key findings from the November 2-7 survey:

- **Radio is very efficient in moving favorables and ballot share.** The data shows that Youngkin radio was twice as effective at moving his favorables and more than four times as effective at moving ballot share. Further, Youngkin radio was more than twice as effective as digital in moving Youngkin's favorables and more than two-and-a-half times as effective at moving Youngkin's ballot share.

The data shows comparable results for McAuliffe. McAuliffe's radio was more than twice as effective at moving ballot share as TV.

Recall Youngkin TV	Youngkin Fav-Unfav	Ballot Youngkin-McAuliffe
Combined (Pos+Neg)	+10	+3
Positive TV	+9	+3
Negative TV	+11	+4

Recall McAuliffe TV	McAuliffe Fav-unfav	Ballot Youngkin-McAuliffe
Combined (Pos+neg)	-4	+3
Positive TV	-4	+2
Negative TV	+1	-1

Net-Net TV Summary: +14 image advantage and zero ballot advantage for Youngkin.

	Youngkin	Ballot
Recall Youngkin Radio	Fav-Unfav	Youngkin-McAuliffe
Combined (Pos+Neg)	+22	+13
Positive Radio	+24	+15
Negative Radio	+23	+15

	McAuliffe	Ballot
Recall McAuliffe Radio	Fav-Unfav	Youngkin-McAuliffe
Combined (Pos+Neg)	-7	+7
Positive Radio	-7	+7
Negative Radio	-7	+7

Net-Net Radio Summary: Youngkin had a +29 image advantage and six-point ballot advantage.

	Youngkin	Ballot
Recall Youngkin Digital	Fav-Unfav	Youngkin-McAuliffe
Combined (Pos+Neg)	+9	+5
Positive Digital	+9	+3
Negative Digital	+11	+5

	McAuliffe	Ballot
Recall McAuliffe Digital	Fav-Unfav	Youngkin-McAuliffe
Combined (Pos+Neg)	0	-1
Positive Digital	0	-1
Negative Digital	+3	-3

Net-Net Digital Summary: Youngkin had a nine-point image advantage and six-point ballot advantage.

Please do not hesitate to contact with any questions.