

RESONANCE MEDIA

Survey Research and Media Analysis

DATE: August 12, 2026

RE: Paid Media Against Results, South Carolina U.S. Senate Special Republican Primary

Republican advertisers placed \$3,963,656 in this race between July 28 and the day before the primary. Group every outside committee with the candidate it was working for, and the spending order does not match the finishing order. Ralph Norman finished second with 6.3 percent of the money. The Fry operation put up nearly a third of everything in the race and finished third.

Candidate bloc	Placed	% of \$	Votes	% of vote	Per vote
Darline Graham	\$1,498,836	37.8%	109,663	32.75%	\$13.67
Ralph Norman	\$250,713	6.3%	82,555	24.65%	\$3.04
Russell Fry	\$1,219,218	30.8%	65,694	19.62%	\$18.56
Mark Sanford	\$783,601	19.8%	50,043	14.94%	\$15.65
Mark Lynch	\$199,162	5.0%	19,866	5.93%	\$10.03
Unattributed	\$12,126	0.3%	7,175	2.1%	

Spending is placement July 28 through August 10, the last full week before the primary. Per vote is that figure divided by primary votes.

Norman bought the runoff slot at \$3.04 a vote. Nobody else in the race was under \$10, and the two candidates who spent the most finished with the two worst rates. Norman placed no broadcast at all. His buy ran 62 percent cable, 22 percent radio and 16 percent digital, a reinforcement mix pointed at voters who already knew the name. The Fry operation outspent him 4.9 to 1 and finished 16,791 votes behind him.

Fry's side spent over a million dollars and finished third. The Palmetto Leadership Fund placed \$772,132 across three spots, and about \$260,000 of it went to the ad attacking Norman. Fry was 57.5 percent undefined at the time, 27.6 percent who had never heard of him and 29.9 percent who knew the name and had no opinion of him. Where voters did know him, he was converting 30.8 percent favorable against 11.0 unfavorable, close to three to one. That ratio against that much open electorate is the case for spending more on defining Fry rather than on attacking Norman, and the fund had eight days and the largest outside buy in the race.

Graham led on the biggest buy in the field. Four committees carried her, the NRSC joint buy, Security is Strength, Palmetto Action and her own campaign, for 37.8 percent of Republican spending against 32.7 percent of the vote. She led, which the money should have produced.

The runoff week is already lopsided. As of Wednesday morning, the Graham committee held \$278,986 placed for August 11 through 17 against Norman's \$21,255. That window includes Election Day itself. Another \$118,210 sits in that same week under Fry, Sanford and Lynch, with no candidate left attached to it. Norman goes into it as the field's leading second choice at 17.8 percent, ahead of Graham at 12.9.

Source: AdImpact export pulled August 12, 2026, covering broadcast, cable, network, CTV, digital, radio and satellite placement for July 28 through August 17. Vote totals are unofficial county returns as reported August 12. Outside spending is assigned as follows. Graham: NRSC/Darline Graham, Security is Strength PAC, Palmetto Action, Darline Graham for SC Senate. Fry: Palmetto Leadership Fund, GSAA/Fry, Fry for SC Senate. Attribution reflects public reporting and committee registration, not anything stated in the export. The export reports at advertiser level, not spot level, so the split of Palmetto Leadership Fund placement across its three creatives is estimated rather than read off the file. Name identification, favorability and second choice figures are from the Resonance statewide survey of 600 likely Republican primary voters fielded August 5, 2026, margin of error plus or minus 4.0 percent. Roughly \$12,000 in digital and CTV placement could not be assigned to a candidate and is shown separately against the combined vote of the six minor candidates. The export does not capture mail, phones, texting or canvassing, so it understates total campaign activity and understates it unevenly. Placement is not delivery.